

International discourses in shaping national education policies:
The case of the UNESCO's Millennium Development Goals (MDG) in Education and the
Education for All (EFA) agenda

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ABSTRACT

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Nation-state governments implement educational policies for improving their national systems and, ultimately, students' learning outcomes. Underlying educational policy-making is a top-down approach that privileges the interests of powerful actors and institutions to the detriment of local communities. Such a top-down approach reproduces international organizations' (IOs) agenda on educational development issues (e.g., quality, literacy and assessments).

This thesis investigated the education-related discourses advanced by UNESCO, a key player in the global arena, by looking at two of its main educational agendas: Education for All and the Millennium Development Goals' reports. These were analyzed through the lens of a discourse analysis approach that included functional and critical perspectives on education. Theoretically, this study was informed by current discussions on the role of IOs in shaping nation-states' educational systems within a globalized context that reproduces social injustices.

The analysis showed that the EFA and MDG's reinforce the understanding of education as instrumental to the postulates of the global knowledge economy. Education, thus, becomes a sub-sector of the economy. Educational networks, including

policymakers, researchers and scholars, are crucial to produce and reproduce this scenario. Furthermore, UNESCO draws upon and furthers discourses that oppose the developing to the developed world, and in so doing reinforces the differences and relationships of power among the countries. Nevertheless, UNESCO agenda opens possibilities for transforming education. It highlights and promotes local agency and participation of community actors in discussions on educational quality improvement and the necessity for reducing inequalities between students from different socioeconomic and cultural backgrounds.

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List of Acronyms and Abbreviations

ANT: Actor Network Theory

CDA: Critical Discourse Analysis

CMEC: Council of Ministers of Education, Canada

CPA: Critical Policy Analysis

EDI: EFA Development Index

EEGGB: Education-Economic Growth Black Box

EFA: Education for All

EQL: Educational Quality

GMR: Global Monitoring Report

IBE: International Bureau of Education

IDRC: International Development Research Centre

ICTs: Information and Communication Technologies

IEA: International Association for the Evaluation of Educational Achievement

IIEP: International Institute of Educational Planning

ILO: International Labour Organization

IMF: International Monetary Fund

INGOs: International Non Governmental Organizations

IOs: International Organizations

KE: Knowledge Economy

MDG: Millennium Development Goals

MINEDUC: Ministerio de Educación de Chile [Chilean Ministry of Education]

MIDEPLAN: Ministerio de Planificación Social de Chile [Chilean Ministry of Social Planning]

NICTs: New Information and Communication Technologies

OECD: Organization for Economic Cooperation and Development

PISA: Program of International Student Assessment

PPP: Public Private Partnership

PNUD: Programa de las Naciones Unidas para el Desarrollo [United Nations Development Programme]

TNC: Transnational Corporations

UIS: UNESCO Institute of Statistics

UN: United Nations

UNDP: United Nations Development Programme

UNESCO: United Nations Educational, Scientific and Cultural Organization

UPE: Universal Primary Education

WB: World Bank

WTO: World Trade Organization

CHAPTER 1: INTRODUCTION

1.1 Preamble

I earned my B.A in Sociology from P. Universidad Católica de Chile in 2000. Later, I began working at the Ministry of Education of Chile as a co-researcher in the Second International Technology in Education Study, (SITES Module 2), qualitative research carried out by the International Association for the Evaluation of Educational Achievement (IEA). My task was to identify and report innovative pedagogical practices around the use of technologies (in schools all over the country). As part of my research undertakings I had to conduct fieldwork, which involved meeting and interviewing school administrators, teachers, principals, students and parents.

In 2003, the Chilean National Foundation for Overcoming Poverty hired me to work in one of the most vulnerable districts of the country, according to the Human Development Index (Chilean Ministry of Social Planning (MIDEPLAN) and United Nations Development Programme (PNUD), 2004). While working for this organization, I was offered a job from the Local Department of Education in Santa Juana, a small village in the South of Chile. I worked in Santa Juana for two years, from 2003 to 2004. In 2003, I provided (the municipality) with professional support for the elaboration of its Strategic Plan for Economic Development. In 2004, I systematized and evaluated a national program funded by the Ministry of Education of Chile. I carried out this work in the Liceo Nueva Zelanda, Santa Juana's only high school.

Having worked as a co-researcher at the Chilean Ministry of Education¹ and with a meaningful professional experience at the community level, I noticed a disconnection between the two worlds. On the one hand, working at the local level, I came to know the school community: the students, parents and teachers, the administrative and directive staff. In a short period of time, I was aware of the different issues there; from the pedagogical projects that were developed at that time, to the complexities that the school faced in terms of solving conflictual situations within the community. On the other hand, I was connected with the national authorities of education in order to develop my task as evaluator. At this level, the process of implementation's process of the program was highly structured and it had to be applied similarly in the fifty-one Chilean high schools that participated in this special national program.

In other words, I sensed a huge gap between the everyday life at the school level and the reality that the Ministry of Education in Santiago – Chile's capital city- aimed to put forth through different policies and programs designed to be implemented at a national scale. At the school level different actors experienced the double task of educating the students and responding to the demand and the increasing pressure from the educational authorities of the national level to reach better results. At the national level, authorities implemented policies and strategies promoting a continuous improvement within the educational system, including the educational management and processes to students' learning outcomes. Specifically, it was from the state to the schools that the educational goals and indicators were implemented through a top down approach. In turn, "national" decisions of educational policies have been also made to respond to the discourses and

¹ After working at the local level during the period 2003-2004, I came back to work at the national level of the Ministry of Education, in the Supervision System (2005-2007) and later in the Planning and Budget Division (2007-2009).

specific agendas that organizations, such as the UNESCO, foster from the international level. This situation suggests a relationship between the national and the local, and at the same time one between the national and the international, where international organizations (IOs) are influencing and shaping world nations' educational agendas and systems.

1.2 Research Problem and Main Statements

As a departure point, I state that educational goals in Chile have been established in a centralized way at the national level; these goals follow closely the dictates and agendas defined in the international arena. In this sense, Chilean authorities, from the beginning of the 1990s, defined objectives related to the improvement of educational quality and equity. However, despite the significant increase in the educational budget² and the accomplishment of large investments and reforms for more than two decades, the country still faces a major problem: reducing the educational gaps between students, which are strongly influenced by the socioeconomic status of their families.

Over the last two decades, the use of a top-down strategy has been the dominant model in the educational sphere. Such a model makes salient a considerable disconnection between national-level authorities and local-level actors, where the latter participate little in the definition of the educational goals³. Fundamentally, while educational goals and policies are designed at the national level, at the bottom of the system school administrators, principals, teachers are responsible for the adequate

² According to Chilean Ministry of Education (MINEDUC, 2010) between the period 1990 and 2008, the public spending in education increased from 11% to 18.8% in relation to the total public spending.

³ Nevertheless, this is not an exclusive characteristic of the educational sector, but of the Chilean state in general from the beginning of the republic. Moreover, another related feature is the paternalistic approach that traditionally has adopted the state in relation to the population.

implementation of these policies. In short, the disconnection between the *national* and the *local* seems to be a problem where national authorities propose educational goals that do not necessarily make sense to the local actors and its communities. And this may occur because national-level authorities are not sufficiently considering the diversity of conditions, identities and backgrounds of the school communities. To some extent, the problem of how educational agenda are defined might be related to the lack of democratic mechanisms that promote citizen involvement at different stages of the educational agenda.

A similar problem can also be seen at the international level and in relationships between different countries. Thus, there would be a parallel between the problematic national-local and the global-national relations, where particular agendas are established internationally from a top-down strategy from the richest or dominant countries towards the less powerful countries. In this sense, it is key to acknowledge the different influences and power that countries have on defining the educational agenda worldwide.

Specifically, international discourses and challenges identified by UNESCO in the educational sphere have been uncritically taken up by the Chilean state. And this situation is reproduced within the country, despite the discourses calling for more participation and involvement of the citizens in educational definitions. Therefore, a top-down approach would be reinforced through global discourses and goals that international organizations seek to enforce on the national and local actors so that they implement specific policies.

In order to approach the problematic relationship among the global, national, and local scales, my thesis examines the international goals related to educational improvement as proposed by UNESCO in the MDG and EFA and its implications to

countries in the so-called developing and developed worlds. Alternating an analysis based on functional and critical perspectives, this study furthers two objectives:

a) To explore how educational goals advocate for reforming the educational system to promote social and economic development, examining the case of UNESCO's Millennium Development Goals (MDG) and Education for All (EFA) agenda.

b) To understand how the EFA and MDG discourses reveal the relationship of power between and within the countries, identifying opportunities and obstacles that these goals offer for improving education and overcoming educational disparities.

In other words, I analyze how UNESCO can understand EFA and MDG as development discourses. Therefore, I discuss how the MDG and EFA can be interpreted as discourses of national *modernization* and social progress. Also, I argue that these discourses might be part of the imperialist / colonial project of the dominant international order. Moreover, it is crucial to acknowledge the role of the national level as a kind of intermediate between the international agenda and the local differences within the countries.

Nevertheless, I must point out that while assuming the relationships of power between and within the countries, I do not assume that what has traditionally been proposed or imposed from above as top-down strategies for policy development is passively received and implemented. To the contrary, my position in this regard stems from acknowledging that from colonial times, discourses from above have never been adopted in a unidirectional way (Abdi & Naseem, 2008) but through the multidirectional forces playing simultaneously based on the encounter of the global and the local -the "glocalized eduscapes" (Abdi & Naseem, 2008, p. 102)- *discourses, knowledges and*

truths. In other words, it is key to recognize that despite the pressure of different agendas in the context of globalization the countries do not respond uniformly to the trends delineated above (Olssen, Codd & O'Neill, 2004) and therefore national systems translate and recontextualize those discourses according to their particularities and existing national ideologies (Ball, 1998). Moreover, although global agendas can be accepted and tailored to different realities, there are, at the same time, forces resisting and rejecting those international discourses within the countries.

I understand the local as active actors or agents –individual or collective- revealing their identities in the adoption of or resistance to the multiple discourses and policies defined from the top to be implemented locally. Also, with respect to the local, I assume that at the bottom of the educational system is the classroom environment or, as put by Palmer (1983, p. 71) the “learning space”. The classroom is one of the main –if not the most important- spaces where individual and social transformations take place and where unique relations are established and played among teachers and students in the teaching and learning’s processes. This is also the final space where policies and discourses are or are not put into practice.

1.3 Research Questions

Considering the goals explicit in the UNESCO’s MDG and EFA initiatives related to educational improvement, I formulate the following research questions:

1. What kind of educational system improvement is UNESCO promoting through the establishment of the goals, objectives, indicators and assumptions explicitly defined in EFA and MDG?

2. What are the main opportunities, difficulties and challenges that countries must face in this regard in terms of the definition and implementation of national and local policies?

Theoretically, my thesis addresses the following general question in relation to the international agenda in education:

- What role do international organizations play in defining the educational improvement agendas, at the local and national levels?

This question includes sub-themes related to a) the different role (more active or passive) that countries play defining and/or adopting the international agenda at the national and local levels, and b) the assumptions that associate educational improvement with social development and the possibilities offered by this global agenda for reaching social justice and diminish the current educational gaps between and within the countries.

1.4 Methodological Approach

The aim of this thesis is to interrogate the UNESCO's goals and objectives of MDG and EFA, which have been taken for granted in the last decades.

Given my general purpose of understanding and interrogating specific educational discourses of UNESCO, this study is designed as qualitative inquiry that borrows elements of interpretivist, critical theory and poststructuralist frameworks (Bodgan & Biklen, 2007; Glesne, 2011). Thus, my thesis aims to scrutinize EFA and MDG discourses by interpreting and understanding what these discourses mean in the context in which they were produced. It also intends to question what is taken for granted and to reveal the relations of power and the ideological forms that operate in the reproduction of the dominant order (Bodgan & Biklen, 2007; Glesne, 2011). For this intention, I examine

information (Bodgan & Biklen, 2007) and related documents by UNESCO in order to reach a holistic understanding of the issue under analysis (Glesne, 2011).

1.4.1 Data Corpus and Analysis

The data corpus for this research includes UNESCO's documents that provide foundational definitions of EFA and MDG. Specifically, I analyze the early documents of EFA and MDG along with summaries of the EFA Global Monitoring Reports (GMR).

For analyzing these documents, I use (critical) discourse analysis (CDA/DA) and (critical) policy analysis (CPA/PA)⁴ approaches. These methodological perspectives provide useful categories and levels of analysis for interpreting the texts and the relation of the discourses to the theoretical perspectives used in this investigation.

1.4.2 Critical Discourse Analysis (CDA)

According to Rogers (2004), CDA represents a pertinent approach to policy studies. From the analysis of "text to the social and political context in which the texts emerge" (Rogers, 2004, p.4), the *critical* view references the study of power relations. In addition, analyzing *discourses* means to consider language in its social dimension, as a social practice (Rogers, 2004). In this sense, "discourse both reflects and constructs the social world and is referred to as constitutive, dialectical, dialogic" (p.5).

Although Rogers states that there are no formulae to develop CDA, the *analysis* is accomplished paying "attention to language and social theory" (p.6). According to the Chouliaraki and Fairclough's analytic procedures (Rogers, 2004, p7; Woodside-Jiron, 2004, p.176-177) CDA,

⁴ As a form to explain the way I develop my analysis, I decided to express the "(critical)" in parenthesis, to visualize my option for realizing an analysis that alternates between the critical and the systemic / functional (non critical) perspectives.

[Is a] model that includes description, interpretation and explanation of discursive relations and social practices at the local, institutional, and societal domains of analysis. The local domain may include a particular text... the institutional... includes the social institutions that enable and constrain the local domain... the societal domain... includes the policies and metanarratives that shape and are shaped by the institutional and local domains. (Rogers, 2004, p.7).

This approach to CDA is relevant to the study of educational policy documents in that CDA allows one for considering the three dimensions of discourses identified by Fairclough (1992): a) text, b) discursive practice and c) social practice. According to Fairclough (1992), this three-dimensional model to the analysis of discourses seeks a multidisciplinary approach based on linguistics, micro sociology and macro sociology (in the way that texts and social practices are analyzed). As he puts it,

The central concern is to trace explanatory connections between ways (normative, innovative, etc.) in which texts are put together and interpreted, how texts are produced, distributed and consumed in a wider sense, and the nature of the social practice in terms of its relation to social structures and struggles. (Fairclough, 1992, p.72)

Other main distinctions of CDA, according to Rogers (2004), correspond to the idea that the analysis advances towards the understanding of the language acting and being shaped in relation to other discourses and in the end by the social and cultural context. Particularly, Rogers adds the relevance to use CDA in the educational setting to investigate how the learning process is carried out within the schools and at the same time shaped by what national policies have defined (Rogers, 2004, p. 11).

Acknowledging the crucial role of language in the social construction of the world, it is important to recognize a main distinction in approaches to CDA. For Jorgensen and Phillips (2002), it is vital to consider how discourse analysis can be approached as a discursive struggle -as assumed by the Laclau and Mouffe's discourse theory (Jorgensen and Phillips, 2002, p.6); or in a broader sense, considering the discourses "among many aspects of social practice" (Jorgensen and Phillips, 2002, p. 7), as stated in the Fairclough approach to CDA. I position my research in the latter view while emphasizing the existence of historically-situated conditions in which those discourses are elaborated.

1.4.3 Critical Policy Analysis (CPA)

CPA has been used by a number of scholars (Olssen, Codd & O'Neill, 2004; Woodside-Jiron, 2004) for analyzing educational policies as discourses. Considering the power relationships especially in relation to the process of policy development and the actors (individuals and institutions) involved, I find it pertinent to also use a critical policy analysis approach (CPA / PA), a variant of CDA.

A key feature shared by CDA and CPA, as pointed by Olssen *et al.*, (2004), is the claim that language and discourses "can produce real social effects", which in the context of educational policies might become "instrument and object of power" (p. 64). These authors remark that for Foucault, "the schooling process is an apparatus for the distribution, appropriation and stratification of discourses" (Olssen et al., 2004, p. 66). They also propose a framework for the discursive analysis of educational policy texts that takes Fairclough's three dimensional approach presented above in order to reveal dominant discourses in education (Olssen et al., 2004, pp. 69-70); for example, analyzing how "neoliberal discourses of accountability, efficiency and effectiveness... have had real

effects in shaping the way in which educational resources are measured and allocated” (Olssen et al., 2004, p. 70).

In Prunty’s view (as cited in Woodside-Jiron, 2004, p. 175) main issues related to CPA are how policies are understood as “agenda[s] or sets of objectives that legitimize the values, beliefs, and attitudes of its authors” (Woodside-Jiron, 2004, p.175). Moreover, equally relevant is to elaborate questions about “how problems arise and appear on agendas, how issues are developed, how policy is developed, and how policy is implemented” (Woodside-Jiron, 2004, p. 175). Thus, it is crucial to explore issues of power underlying definitions of what is considered a problem and what are the solutions proposed (Woodside-Jiron, 2004, p. 175).

In this sense, policies are ideological by nature and have ideological effects, and are referred directly to the exercise of political power (Olssen *et al.*, 2004). In Robinson-Pant’s view (2001), there is an ideological dimension in the educational planning and policymaking discourses, where political agendas of different development agents are explicitly represented. Further, in practice, there is a gap between what the author identifies as “developed and the developer” (p.312).

Finally, Olssen *et al.* (2004) distinguish two kinds of policy analysis: a) analysis *for* policy, focused on the information needed for policy construction and recommendations and, b) analysis *of* policy, which analyzes the process of construction and the effects of determinate policies; and the analysis of policy content and its context, which depth in the values, assumptions and ideologies (Olssen, Codd and O’Neill, 2004, p.72). This distinction allows for a dual analysis that is proposed in this study: the analysis *for* policy

makes possible to interpret UNESCO's discourses from a functional approach; and the analysis *of* policy allows the critical interrogation of the discourses.

1.5 Scope of the Study

This research approaches the issues outlined above through a theoretical and conceptual discussion about the educational discourses elaborated by UNESCO in relation to EFA and MDG. In this sense, I lay down a theoretical framework in order to understand how education is influenced from different dimensions and perspectives, namely: a) globalization and education; b) the role of International Organizations (IOs) shaping the educational agenda; c) the process of national policy making; and d) discourses of development related to the educational agenda.

Although many other policy documents apart from those analyzed could be considered for a more comprehensive analysis, this was not possible due to limitations of time and scope of the study. Consequently, I have decided to focus on the analysis of some core public documents elaborated by UNESCO directly related to the foundation and monitoring of the Millennium Development Goals (MDG) and Education for All (EFA). Moreover, acknowledging the relevance of other International Organizations (IOs) as the Organization for Economic Cooperation and Development (OECD) and the World Bank (WB) promoting agendas in education and shaping national policies around the globe, the discourses –in terms of concrete documents- of these institutions are not considered as part of the data corpus.

Some information about Chile and Canada is presented for illustrative purposes, but it is relevant to mention at this point that this research does not attempt to compare these countries. Certainly, a comparative analysis might be interesting in order to interpret

specific discourses of UNESCO and the way that those are adopted within the national contexts.

1.6 Limitations

This research is primarily based on existing sources, in order to develop a conceptual discussion from the analysis of public documents and their relation to theoretical perspectives. Nevertheless, I admit the importance of investigating the motivations, attitudes, values and interpretations of the different actors involved in the process of understanding, adapting and implementing the international educational agenda: the educational community of teachers, students, parents, researchers, academics, policymakers and politics. This kind of empirical fieldwork exceeded the possibilities of this research, but certainly it may be considered for further studies.

On the other hand, it must be considered that the documents analyzed do represent a partial view in relation to the whole discussion about the educational improvement agenda in which UNESCO has participated actively for many decades. Moreover, apart from UNESCO many other organizations –governmental, privates and also non-governmental organizations- are working the same issues and/or proposing alternatives for supporting future educational development.

CHAPTER 2: THEORETICAL FRAMEWORK

In this chapter, I will develop the theoretical context for my analysis of UNESCO discourses, which form the *data corpus* of this research. This theoretical framework is based on four perspectives elaborated and discussed extensively in the educational field:⁵

1) Globalization and the knowledge economy; 2) the role of international organizations (IOs) in education and the establishment of the literacy improvement agenda; 3) the policymaking process; and 4) education and development discourses.

I will present these perspectives separately in four sub-sections for analytical purposes. At the end, I will explore the interconnections between the dimensions and concepts presented.

2.1 Globalization and the role of education

2.1.1 Education in the globalization era

During the last decades, discourses about globalization have strongly permeated both the academic and public policy spheres. In general, different authors (Apple, Kenway and Singh, 2005; Arshad-Ayaz, 2008; Beck, 2000; Dale, 1999; Olssen, Codd and O'Neill, 2004; Peters 2006, 2007; Spring, 2009; Stromquist and Monkman, 2000; Stromquist, 2002) agree about the strong connections and an intrinsic relationship between globalization and the economic agenda. At the same time they also point to globalization's great influence in cultural and political arenas. This predominance of the

⁵ Although not limited to the educational field. Indeed, the topics approached in this chapter have a direct relation to others disciplines such as sociology, political sciences, economy, linguistics, anthropology and philosophy. My attempt in this sense is to take a multidisciplinary approach in order to promote a holistic understanding of education.

global economic agenda permeating other social spheres is the starting point for the development of this research.

More specifically, some of the above-mentioned authors have investigated the process of globalization and how it has tremendously affected the way in which nations around the world are currently defining challenges in education (Apple, Kenway and Singh, 2005; Arshad-Ayaz, 2008; Dale 1999; Olssen, Codd, O'Neill, 2004; Peters, 2006, 2007; Spring, 2009; Stromquist and Monkman, 2000; Stromquist, 2002). There is a consensus about the central role that the New Information and Communication Technologies (NICTs) and the development of the transport system have played in interconnecting societies, their economies and cultures around the world, and in shaping the different forms that globalization takes. Globalization is understood as a contested, broader and even an ambiguous notion by several scholars (Arshad-Ayaz 2008; Peters 2006, 2007; Stromquist and Monkman 2000; Stromquist 2002): not only because of the dimensions involved -including implications in the economic, political, social and cultural spheres- but also because of the positive and negative impacts that global processes have produced in the world order. Acknowledging the benefits that this interconnection has produced globally, I consider it necessary to point to the existence of enormous inequalities in the distribution of such benefits –not only affecting the human being but the entire planet's ecosystem- and the reproduction of social injustices and privileges of some countries and individuals over others. More concretely, many regions and peoples remain in vulnerable and precarious life conditions. Indeed, UNESCO states that in 2008 there were as many as 759 millions people who were not literate; 131 million

of whom were youth (UNESCO 2010a), thus providing a major challenge to educational systems around the world to improve literacy rates.

As stated by Stromquist (2002), this process is highly marked by the imposition of a neoliberal economy, based on three main prescriptions: deregulation, privatization and liberalization. The main paradigm is the free market based on competition, a zero-sum game with consequent winners and losers (Stromquist and Monkman, 2000; Stromquist, 2002). According to these authors, relevant actors in this scenario of the global economy are the Transnational Corporations (TNC) (Stromquist and Monkman, 2000), with enormous influence in economic and political decisions at the international level. National education systems and policies are directly affected by this situation, according to Stromquist and Monkman (2000, p. 6):

The emergence of TNCs as major players has implications for education. With business and profitability as the main referent, “social and public services interests are devaluated” and “appropriate knowledge becomes increasingly narrowly defined” (Kempner, 1998, p.455). At local levels, there are increasing presence of business in cooperation with the schools, determining what constitutes quality and what is needed. (Stromquist and Monkman, 2000, p.6)

In a similar way, Apple, Kenway and Singh (2005) use the notion of *globalization from above* imposed by the *Minority World* (referring to the dominant Western countries) to characterize this process of policy-making. In this sense, policies are defined and implemented from a top-down perspective and carried out by *multinational corporations* and *supra-national political organizations*, under clear trends and patterns of internationalization, marketization, universalization, Westernization and

detritorialization. According to Apple and colleagues, these processes are presented as if they were ‘unstoppable or inevitable’ (see also Arshad-Ayaz, 2008, p. 484).

Considering the centrality of the economic dimension in the global order, some scholars (Arshad-Ayaz 2008; Beck 2000; Peters 2006, 2007; Stromquist and Monkman 2000; Stromquist 2002) have also highlighted the crucial role that different countries have given to education in order to support social and economic development around the world. Educational policies follow this trend by increasing the number of private schools, which are considered commodities, with a focus on the improvement of labor force skills and their importance for countries’ competitiveness, in contrast to an understanding of public education as a social good (Stromquist and Monkman, 2000; Arshad-Ayaz, 2008).

Complementarily, according to Spring (2009), there is a close relation between education and the globalization process. In his view, “schooling provides an entrance into the global economy” (p. 12) where education plays a central role in certifying people in what he refers to as the ‘credential society.’ The globalization of education is characterized among other components by:

...[1] the adoption by nations of similar educational practices, including curricula, school organizations, and pedagogies... [2] global discourses that are influencing local and national educational policymakers, school administrators, college faculties and teachers... [3] Intergovernmental and nongovernmental organizations that influence national and local educational practices... [4] Global networks and flow of ideas and practices... [5] Multinational corporations that market educational products, such as tests, curricula, and school materials... [6] Global marketing of higher education and educational services... [7] Global

information technology, e-learning and communications... [8] The effect of world migration of peoples on national and local school policies and practices regarding multiculturalism ...[9] The current effect of English in the global language of commerce and local school curricula and cultures... (Spring, 2009, p.5)

At this point, I wish to point to the importance of global discourses influencing national definitions of education systems in different areas (from curricular to organizational), as it will be more explicit in the following sections about the role of International Organizations (IOs) and the way the policymaking process takes place. Also, it is important to point out the international relevance given to the English language – keeping in mind the context of literacy agendas-, which can be interpreted both as the massive introduction of the economic-financial language and, more generally, as an attempt to impose the language of the dominant world (from the so-called ‘developed’ to the ‘developing’ countries).

2.1.2 Education and the Knowledge Economy (KE): economic growth, human capital, competitiveness and knowledge (re)production

The notion of *knowledge-based economy* (KE) (or more extensively knowledge and learning economy) has been assumed universally by national and international organizations in the academic, and governmental and non-governmental policy spheres as well as in the private sector. Fundamentally, the KE is founded under the postulates of the human capital model, the individual’s insertion in the labour market and the improvement of countries’ competitiveness in the international economic order in order to sustain economic growth (Apple, Kenway and Singh, 2005; Arshad-Ayaz 2008; Dale 1999; Peters, 2006, 2007; Stromquist and Monkman 2000; Stromquist 2002).

Thus, according to these scholars (Apple, 2000; Apple, Kenway and Singh, 2005; Arshad-Ayaz 2008; Dale 1999; Dale and Robertson, 2007; Peters, 2006, 2007; Spring, 2009; Stromquist and Monkman, 2000; Stromquist, 2002), discourses about the KE have consequently permeated the educational agenda –from the basic levels to higher education- as education has become instrumental to the interests of the global economy. This situation not only connects education with the production of knowledge, but also relates it to the acquisition of skills and competences needed by countries to reach economic development.

According to Spring (2009), the origin of the knowledge economy is associated with models of human theory, especially with the work of Gary Becker who in 1964 stated, “economic growth depends on the knowledge, information, ideas, skills, and health of the workforce” (Spring, 2009, p.38). Therefore, spending in education was considered an investment to improve human capital in the context of the capitalist economy - or the ‘knowledge capital economy,’ a more precise notion in Becker’s view (Spring, 2009, p38). Additionally, Spring (2009) mentions the work of different scholars, such as Daniel Bell in the 1970s, Peter Drucker or Manuel Castells in the 1990s to understand the role that knowledge played in the economy and society. Moreover, Spring (2009) remarks the role of the World Bank (WB) in promoting the agenda of the KE, consisting in “[1] Economic growth dependent on the knowledge, information, ideas, skills, and health of the workforce... [2] Post-industrial shift from blue collar to white-collar labour... [3] Post secondary education is one of the most influential determining economic productivity” (Spring, 2009, p. 44).

Also, according to Spring (2009) the WB developed a particular understanding of education for the promotion of the knowledge economy, where schooling plays a functional role to support economic development:

[1] Literacy for functioning in the day to day life of an economically advanced society... [2] Literacy for manipulating information... [3] Science and math literacy... [4] Foreign language instruction, particularly in English... [5] Civic education to achieve rule by law and a good government able to achieve economic development... [6] Learning to function in multicultural groups... [7] Learning to act autonomously... [8] Learning to use tools... [9] Preparation for Lifelong Learning. (Spring, 2009, p.44)

In Spring's view, "The World Bank's concept of literacy is purely instrumental for completing work related to tasks in the knowledge economy... [it] does not include critical literacy skills [nor] reading for personal enjoyment such as learning to read and appreciate literature..." (p.45). As I present below, this understanding of education will affect the way that the WB and other IOs –such as UNESCO and OECD- define and promote their educational agendas, sometimes supporting together the same discourses through educational networks, in other cases emphasizing different dimensions such as the promotion of human rights, social justice or peace in the case of UNESCO.

In addition, Nussbaum (2010) notices a current emphasis on what she calls 'education for profit' or 'education for economic growth' models (p.10). In her view, the fact that education be reduced to the acquisition of determinate skills -basic literacy and numeracy, or advanced skills in science and the use of technologies- represents the 'old model of development,' and it might threaten the fulfilment of democratic ideals and superior aims

of the humanity, while economic growth is reached with a considerable proportion of the marginalized population: “Equal access, however, is not terribly important; a nation can grow very nicely while the rural poor remain illiterate and without basic computer resources...” (p.19). Moreover, analyzing the current scenario for educational governance, Leuze, K., K. Martens, & Rusconi, A. (2007) state the emergence of new education markets that affect the way decision-making is accomplished within the countries. Indeed, they recognize the importance of new actors and institutions (from the business and for-profit economic governmental sectors, World Bank, OECD or World Trade Organization (WTO)) as active players defining the current educational structures (Leuze, K., K. Martens, & Rusconi, A., 2007). Specifically, Knight (2007) states that these IOs have promoted concrete educational development, opening new market opportunities in: cross-border education, import tertiary education, testing services, software providers, and publisher companies. At the same time, new providers –commercial, corporative, professional, governmental-, delivery methods –face to face, e-learning or a combination-, and programs –franchise, twinning, double degree⁶- have appeared in the educational sphere⁷. These providers point out to fulfil the expectations of the KE and the credential society, related to the education of the workers’ skills, knowledge and capabilities needed to obtain individual and social benefits.

Spring (2009) remarks some critiques of the close relationship established between education and the KE:

⁶ Knight (2007) defines these programs as: Franchise: the provider A authorizes provider B to deliver their course. Qualification is awarded by country B. Twinning: students are allowed to take courses in country A and B. There is one qualification from country A. Double degree: two institutions award the student (Knight, 2007, p. 141).

⁷ Knight’s view (2007): these processes can be still considered as emergent issues and some time is needed to visualize the impacts on the educational systems. Nevertheless, the quality of education imparted and the kind of the services provided are the main concerns that should be studied in the near future (Knight, 2007).

[a] ...not enough jobs in the knowledge economy to absorb school graduates into skilled jobs... [b] Brown and Lauder argue that multinational corporations are able to keep salaries low by encouraging nations to invest in school that prepare for the knowledge economy... [c] Another effect is so-called brain waste where well-educated school graduates are unable to find jobs commensurate with their skills... in addition, educated workers from developing nations have become part of the so-called 'brain migration' moving from their countries to wealthier nations where salaries are higher... [d] The oversupply of educated workers, it could be argued, depresses wages to the advantage of employers... (Spring, 2009, p.50-52).

As mentioned above, the human capital model can be developed through the education of future “workers for competition for jobs in the global economy” (Spring, 2009, p16). Similarly, in Apple’s (2000) view education plays a fundamental role in the formation of students who will be integrated as future workers. What is central here is the understanding of students as a capital (more or less qualified) that has to be integrated into the labor market. Prospectively, according to Shapiro (2002) there is an enormous expansion expected in higher education over the next twenty-five years, explained principally by the “sophistication of ‘knowledge work’ which will be accompanied by an apparently insatiable demand for ‘knowledge workers’” (p. 13). In order to reach this objective, some common patterns are developing globally, following the postulates of Anderson–Levitt: these are the “standardization of the curriculum... standardized testing for promotion, entrance, and exiting from different levels of schooling... performance evaluation of teaching... mandated textbooks... World languages, particularly English” (Spring, 2009, p. 16-17).

Moreover, according to Hayhoe and Mundy (2008) the investment in human capital approach is at the core of the studies realized by comparative educators who work in a positivistic mode from the 1960s. These authors state that two main questions have been approached from this perspective: a) what kind of investment is required to obtain the highest individual and social benefits in terms of economic return? And b) what are the factors influencing educational achievement within and out of the school? (p.10). Related to these questions, Hayhoe and Mundy, 2008 remark the two main emphases of the educational agenda in the global era: the relationship of education and economy, and the improvement of the students' learning outcomes. This latter point refers directly to the notion of competitiveness promoted in the knowledge economy.

Indeed, competition seems to be at the centre of the educational improvement. Students, schools, districts and countries receive constant pressure for obtaining better learning outcomes. As Spring (2008) remarks: "The knowledge economy plays a role in discussions about economic development and competition between nation-states and supranational government organizations..." (p.338). Specifically, in education the competition takes place within and between countries to be at the top of the educational rankings. This trend is well analyzed by Baker and LeTendre (2005). According to them, "...even top-scoring [in international tests] Singapore manages to admit that there is 'room for improvement' in mathematics and science education" (Baker and LeTendre, 2005, p. 151). Moreover, they note the preoccupation that countries put in relation to their weakest students in order to maintain its international competitiveness (Baker and LeTendre, 2005, p.173). Similarly, in direct relation to the competitive logic of the KE, Martens (2007) introduces the notion '*governance by comparison*' (Martens, 2007, p.40)

promoted actively by OECD, basically referring to countries' tendency to compare educational performance in terms of ranking and rating (R&R), remarking the function of Program of International Student Assessment (PISA) as a relevant standardized test that highly influences national definitions of educational systems (Dale and Robertson, 2007).

To some extent, these standards might be understood as the expected learning outcomes of the students by national governments, becoming thus the relevant knowledge and skills that students must acquire.

In this sense, assuming the crucial role of education in the production and reproduction of knowledge, Peters (2007) identifies a transition in the understanding of education. While earlier knowledge had to be acquired and transmitted, in the postmodern era knowledge is considered a key dimension that determines and creates new forms in society, especially in the economy. According to Peters (2006, 2007), education plays a central role in the new growth economy, forming its human capital and producing new knowledge required to be functional to the purposes of capitalism.

According to him:

... knowledge (as a much broader concept than information) can be considered in terms of “know what” and “know why”... embracing both factual knowledge and scientific knowledge, both of which come closest to being market commodities or economic resources that can be fitted into production functions. Other forms of knowledge, what the OECD identifies as “know how” and “know who” (after Polanyi 1967; see also Polanyi 1958) are more difficult to codify and measure. (Peters, 2006, p. 54).

The focus on the production of knowledge and the learning process in the global economy is directly related to the advanced development of science and technology. These processes are at the core of the current society, and thus they make it possible to ensure a strong relationship between education and industry (Peters, 2006, 2007; Arshad-Ayaz, 2008, p.494-495). In this regard, as Arshad-Ayaz (2008) points out, this situation “tends to produce managers instead of citizens needed for an equitable and just world” (p.489). Similarly, although Krishnamurti (1981) does not write about the relationship between education and the knowledge economy, his observations are relevant to understand critically the current emphasis of the educational system: “education is a complete failure because it has over-emphasized technique. In over-emphasizing technique we destroy the man” (Krishnamurti, 1981, p. 18). Therefore, although he recognizes that technology’s progress helps to solve some kinds of problems, the use of techniques without a profound human sense has led to negative consequences for humankind, producing hate and cruelty among human beings (Krishnamurti, 1981). These issues become relevant when questioning the purpose of education and the possibility of promoting democratic and social values beyond economic goals.

Furthermore, Fairclough (2002) states that the capitalist order –restructuring itself within the ongoing process of globalization- establishes a ‘colonization’ of the educational field, particularly higher education, by economic interests. As it is presented in the Editorial of Quality of Higher Education (1995), within the relationship between the academia and the industry “there is increasing pressure for higher education to attract money from industry and commerce” (Quality of Higher Education, 1995, p. 6-7). It is a controversial issue, and while some people think this link would be beneficial to

universities, others are skeptical about the results of such an alliance. According to Peters (2007), the neoliberal economy connects higher education and industry through the promotion of a “regional development based on clustering of knowledge activities... with emphasis on public private partnerships [...] to promote an entrepreneurial culture...” (p.131).

According to Fairclough (2002) there are specific discourses that shape knowledges:

knowledges are produced, circulated and consumed as discourses (economic, organizational, managerial, political, educational and so forth)[...] Moreover, discourses are dialectically materialized (Chouliaraki and Fairclough, 1999; Fairclough, 2001) in the ‘hardware’ and ‘software’ of organizations, enacted as ways of acting and interacting, and inculcated (through a variety of processes including, e.g. ‘skills training’) as ways of being, as identities[...] that transformations of organizations (workplaces, universities, local government, etc.) [...] are partly, and significantly, semiotic and linguistic transformations. The emergence of a ‘knowledge-based’ economy means that knowledge, both as ‘know-how’ and ‘know-that,’ and hence semiosis, both as genres (‘know-how’) and discourses (‘know-that’), become commodities. (p. 164).

In Fairclough’s view (2002), considering knowledge as a commodity is a main feature of the knowledge economy. Complementarily, the work of Michel Foucault (1980) on the direct relationship between knowledge and power might facilitate the understanding of the knowledges produced and oriented to the reinforcement of the economic system. Indeed, according to Foucault (1980) it is precisely in the process of exercising power where the ‘truth’ is defined and imposed. For him, any society has its

own regime of truth, the discourses that it accepts and produces as true, and its mechanisms to distinguish true or false statements. Specifically, knowledge and truth are directly related to the scientific discourses and the institutions that produce them. Thus, discourses are not referred to as true things that are necessary to discover or accept, but to the rules that discriminate what is true or untrue, what is considered valid or non-valid knowledge. I will come back to this point later, when I examine the International Organizations (IOs) as entities that exercise power since they have a considerable degree of autonomy from the nation-states that conform them in order to make decisions and create the social world.

As mentioned above, the globalized trends in education are directly connected to the agendas that International Organizations promote. The following second sub-section is dedicated to exploring the way they function and their role influencing the educational agenda.

2.2 The role of international organizations⁸ in defining the educational agenda and influencing / shaping national education systems

A main distinction for appreciating what International Organizations represent and produce in the global scenario is presented by Barnett and Finnemore (2004).

Interestingly, they acknowledge that different scholars working ‘within liberal theories’ have presented a positive predisposition to studying IOs (Barnett and Finnemore, 2004).

According to them, “Within liberal theories, international organizations have been viewed not only as facilitators of cooperation but also as carriers of progress, the

⁸ In this research I consider IOs in relation to what Spring (2008) has called *Intergovernmental Organizations* (IGOs) or what Apple, Kenway and Singh (2005) in a more general sense have called *supranational political organizations*. Thus, while acknowledging their relevance, I’m not referring specifically to the role, discourses or practices that International Non Governmental Organizations (INGOs) play in the educational sector.

embodiments of triumphant democracy and purveyors of liberal values, including human rights, democracy, and the rule of law” (Barnett and Finnemore, 2004, p. ix).

Moving away from this uncritical approach to IOs, can be understood as bureaucracies characterized by four aspects reflected in their behaviour: autonomy, power, dysfunction and change (Barnett and Finnemore, 2004, p. 3). The third and fourth elements are relevant to understand IOs’ deviations from their declared goals through bureaucratic processes, and the unexpected transformations they produce –new tasks and or procedures, among others-, respectively (Barnett and Finnemore, 2004, pp. 8-9). Nevertheless, for analytical purposes, in this research I highlight autonomy and power as the main dimensions of the IOs shaping and regulating the social world.

2.2.1 Autonomy and Power of International Organizations: understanding how IOs shape national educational systems

In terms of autonomy, although Barnett and Finnemore (2004) recognize that IOs can be understood as controlled by certain powerful nation–states, at the same time IOs need some degree of autonomy in order to act and implement specific tasks. Thus, “IOs may act autonomously within a ‘zone of discretion’” (Barnet and Finnemore, 2004, p. 4). The autonomy of IOs from the states that conform them allow us to study them as bureaucracies with ‘top decision-making bodies’ and with ‘authorities in their own right’ (Barnet and Finnemore, 2004, p. 4-5). In this way, IOs employ

means that are mostly rational, technocratic, impartial, and non- violent... Their means, like their missions, give IOs authority to act where individual states may not [because] IOs staff must transform these broad mandates into workable

doctrines, procedures, and ways of acting in the world. (Barnett and Finnemore, 2004, p. 5).

Simultaneously, while working autonomously, IOs exercise their power by regulating but also constituting the social world through “their ability to make impersonal rules” (Barnett and Finnemore, 2004, p. 3). According to these authors, IOs are powerful and produce actual consequences with those regulations and “their authority to orient action” (p. 6). Specifically, IOs produce “...new categories of actors, form new interests for actors, define new shared international tasks, and disseminate new models of social organization around the globe... they also expand, taking on new missions, mandates, and responsibilities...” (p. 3).

In this way, the authors (Barnett and Finnemore, 2004) recognize the power of IOs in setting the “agenda for global governance... [and] defining ‘good practices’ and ‘good governance’...” (p. 7). As autonomous institutions, they can be analyzed as political actors with “particular resources for shaping political action” (p. 12).

Complementarily, writing about the relationship established between the comparative education approach, globalization and the knowledge economy, Dale (2005) affirms the central role that IOs play in defining and complementing the educational agenda in national systems. In Dale’s (2005) view, this

enables a set of definitions of education to be established at a supranational level that are in this case linked to the achievement of a global knowledge economy that are distinct from and parallel with existing national definitions and assumptions, but often equally demanding and important. (Dale, 2005, p. 119).

In order to understand this role of global educational trends in the knowledge economy, Dale (2005) states the necessity of exploring the way that ‘different scales of governance’ are related (Dale, 2005, p. 124). Basically, the work of the comparative education approach has been focused on the relationship between nations from the national perspective (Dale, 2005). According to Dale (2005), it is necessary to consider the supranational as a level above the national, in a distinct and separate level (autonomous following the postulates of Barnett and Finnemore (2004) presented above). It is this particularity that characterizes and differentiates globalization from the notion of international (between nations) or transnational (across nations) (Dale, 2005, p.125). Nevertheless, it is crucial to notice (as I show in the next section about the process of national policymaking) that this situation does not signify that national systems diminish their capacity in decision-making processes (Dale, 2005, p.122). In other words, in Dale’s view (2005) this process is not a total convergence that starts at the supranational toward the national or local levels but a complex interrelation between different territorial levels. Thus, although it might be convergence among territorial levels in different issues, this convergence cannot be understood as a condition but as a possibility where the local, national or supranational scale act (Dale, 2005, p. 122).

Also, Dale (2005) recognizes the power of supranational organizations setting the agenda and “the rules of ‘what education is about’” (p. 131). For example, Dale (2005) mentions “the development of international education statistics, performance indicators and benchmarks” (p. 131) that education systems follow globally. However, these rules and agendas affect nations differently, according to the unequal distribution of power among nations that conform the IOs (p.131).

Several authors analyze the case of different IOs in order to illustrate how they participate in the definition of the agenda in education. Thus, Stromquist (2007) recognizes that while diverse agencies influence global agendas, they impact nations in different ways. Indeed, according to Stromquist (2007), the influence of the international agencies over countries can vary. In her view, while some agencies can impact strongly in the national level at the discursive level (such as the case of UNESCO and UNICEF), others organizations such as the World Bank impact the countries at the operational level (Stromquist, 2007, p. 259).

2.2.2 Understanding IOs working in education: similarities and differences from the WB, OECD to UNESCO

At this point, it is pertinent to present the principal IOs that currently influence and define the educational sphere, acknowledging the existence of similarities and differences among them. Specifically, some scholars (Apple, Kenway and Singh, 2005; Leuze, K., K. Martens, & Rusconi, A., 2007; Olssen, Codd and O’neill, 2004; Peters, 2006; Spring, 2008, 2009; Stromquist, 2007) identify IOs such as the United Nations Educational, Scientific and Cultural Organization (UNESCO), the Organization for Economic Co-operation and Development (OECD) and the World Bank (WB) as the most relevant players leading the definition and promotion of the current educational agenda, establishing macro assumptions, orientations and regulations that have shaped the construction of national policies.

2.2.2.1 Distinction among IOs

A principal distinction must be made regarding the nature of IOs. Thus, while UNESCO promotes a holistic understanding of development that includes peace, social

justice and economic growth, in which education is considered a human right, other IOs like the WB, OECD and WTO are intrinsically economic institutions and consequently committed primarily to the agenda of economic development. Together, these institutions have a high influence in national education systems through the fulfilment of international regulations but also universal commitments, such as the Millennium Development Goals and Education for All's initiatives led by UNESCO, which are supported by the above-mentioned IOs as well as others like the International Monetary Fund (IMF) and the International Labour Organization (ILO).⁹ Interestingly, many of these IOs –UNESCO, WB, ILO, IMF, among others- are specialized agencies of the United Nation system (Riddell, 2007, p. 83).

2.2.2.2 Roles of Specific IOs: the World Bank (WB) and the Organization for Economic Development and Cooperation (OECD) as relevant institutions promoting the Knowledge Economy

The following table (Spring, 2009) summarizes the main similarities and differences in the goals and kinds of instruction promoted by UNESCO, the WB and the OECD in a globalized context.

⁹ In this study I do not explore the IMF and the ILO. While the first one represents the economic growth perspective, the latter has played an important role in influencing and promoting the agenda on lifelong learning (LLL). The main objectives of this organization are to improve working conditions and to contribute to peace and social justice. According to Jakobi (2007), the ILO and the WB are actively involved in the LLL agenda, but they do not converge in their aims (social justice and economic development, respectively).

Table 2.1. World Education Culture: Educating the Global Citizen (Spring, 2009, p. 81)

	World Bank	OECD	UNESCO
Goals	Educating workers for the knowledge economy; ability to function in a multicultural society and workforce; gender equality; social cohesion	Educating workers for the knowledge economy; ability to function in a multicultural society and workforce; gender equality; social cohesion	Educating global citizens committed to sustainable development; sustaining and protecting cultures and languages; gender equality; activist citizen
Instruction	Standardized curriculum; assessment-driven, ICT; learner-centered; knowledge rich; group work	Standardized curriculum; assessment-driven, ICT; learner-centered; knowledge rich; group work	Participatory decision-making; interdisciplinary and holistic; critical thinking; locally relevant; values driven-sustainable development

Although with similar objectives and emphasis, Spring (2009) states as a distinctive difference between WB and OECD the emphasis they place on developing and developed countries, respectively. In his view, although they share the emphasis on the knowledge economy and human capital development, while the WB stresses economic development, the OECD also emphasizes simultaneously the importance of reaching social cohesion in developed countries. In the following sub sections, brief description about these organizations is presented.

a) The role of the World Bank (WB) in the educational sphere

According to several authors, the World Bank is one the most important institutions currently promoting educational development (Baker and LeTendre, 2005; Spring, 2008, 2009; Leuze, Martens and Rusconi, 2007). Founded in 1944 as a specialized agency of the United Nation system (Riddell, 2007), the WB participates actively in setting the

global agenda on educational policies and practices (Leuze, Martens and Rusconi, 2007). The WB supports investment in education to form human capital and reduce poverty, and it also provides “loans for infrastructure, institution and capacity building projects, and undertakes research on policy and best practices” (Mundy, 2007, p. 37). Specifically, Baker and LeTendre (2005) state that the main focus of the WB is to monitor and encourage economic development in developing nations, and with this purpose there is an “emphasis on educational planning [as] the starting point for the whole process of educational improvement” (Baker and LeTendre, 2005, p. 30). Moreover, according to Baker and LeTendre, 2005) education is considered by the WB as a means for economic growth, recognizing it as “one of the most powerful instruments for reducing poverty and inequality” (p. 30).

Furthermore, Spring (2009) remarks the key role of the WB in the promotion of discourses about the knowledge economy, stressing the improvement of human capital and the construction of national innovation systems at a societal level. But there is also an individual level, which Spring (2009, p. 40) refers to as “the ideal personality for the knowledge economy”:

The World Bank’s concept of the knowledge economy includes a particular idea about individuals’ psychological attitudes and dispositions.... [1] *Acting autonomously...*” (p. 40) “[2] *Using tools interactively* [‘use of technological tools, information, and symbols’]... In this context, the knowledge economy becomes a world of migrant workers including corporate leaders, managers, technical operatives and professionals, skilled and unskilled laborers... [and 3] *Functioning in socially heterogeneous groups* ... interact effectively with other

people... to relate well to others, cooperate, and manage and resolve conflict.

(Spring, 2009, p. 42).

These attitudes and dispositions are relevant to the production and reproduction of the KE itself, because they understand individuals as means for achieving economic goals through the acquisition and development of skills to function in society and become productive workers. Moreover, emphasizing the autonomy of the individuals might promote the idea that personal economic achievement is direct consequence of individual actions -and personal merits- and not as result of individuals' actions within the social structure.

b) The Organization for Economic Cooperation and Development (OECD) in education

Though founded in 1961, according to Martens (2007) the OECD became an influential actor in education in the 1990s, and in 2002 education obtained its own directorate within the organization (Martens, 2007; Mundy, 2007; Dale and Robertson, 2007). The main objectives of the OECD are related to sustainable economic growth, social cohesion and personal development, and for this purpose the OECD supports its members in order to develop a good system of lifelong learning (Mundy, 2007). The OECD carries out research to share and compare among members and partners, promoting policy dialogue:

[OECD] collects crossnational statistics and indicators of education systems, sponsors standardized assessments (PISA) to evaluate learning outcomes and facilitate crossnational comparisons; supports crossborder mobility of faculty and staff of EU member states through mutual recognition and qualifications,

contributes to the policy dialogue regarding restructuring teachers' work and careers, and builds social cohesion. (Mundy, 2007, p. 38).

This organization has notorious presence in international and national forums of education, beyond its members. Indeed, OECD assumes an active role together with WB and UNESCO in the elaboration and dissemination of the educational agenda through the world.

2.2.2.3 United Nations Educational, Scientific, and Cultural Organization

(UNESCO): ensuring access and quality in education through EFA and MDGs

a) The role of UNESCO as international organization promoting educational agenda

Founded in 1945, “UNESCO’s mission is to contribute to the building of peace, the eradication of poverty, sustainable development and intercultural dialogue through education, the sciences, culture, communication and information”.¹⁰ Specifically, UNESCO promotes “education as a fundamental right through the elaboration of normative frameworks, conventions, declarations, recommendations and programs of action” (Mundy, 2007, p. 37-38). As a specialized agency of UN (Riddell, 2007), UNESCO also offers a forum for policy dialogue –at the global, regional, multilateral and bilateral scales- with a focus on the improvement of the quality of education. With this purpose, UNESCO provides “technical advice, setting and monitoring standards, implementing projects, compiling comparable statistics on national education systems, capacity building and networking” (Mundy, 2007, p. 37-38).

¹⁰ Retrieved from <http://www.unesco.org/new/en/unesco/about-us/who-we-are/introducing-unesco/>

In a similar fashion, Spring (2009) notes that the organization has a “humanistic vision of lifelong learning” (p. 66). However, he recognizes that in the 1990s UNESCO’s discourses on lifelong learning changed towards those of the KE and human capital: “In the 1990s, UNESCO’s humanistic approach to lifelong learning was swept up in the rhetoric of the knowledge economy and human capital development. Despite this UNESCO avoided the purely economic arguments for lifelong learning...” (Spring, 2009, p. 69).

In this sense, although adopting and reproducing global discourses about the KE, Spring (2009) acknowledges that UNESCO continues to promote agendas related to its core aims, from the preparation of citizens for the understanding of environmental problems and sustainable development to engaging students and citizens towards critical thinking and participatory decision-making (Spring, 2009, p. 72).

b) The establishment of EFA and MDGs: Accessibility and Educational Quality

According to Stromquist (2007), in the 1990s leaders of UNESCO and representatives of other IOs and national governments made a great commitment to improve education around the world, as result of the acknowledgement of the relevance that education has for promoting “human rights, social equality, democracy and economic growth” (Stromquist, 2007, p.260). This commitment was accomplished in the context of the *Education for All* (EFA) movement (UNESCO, 1990, 2000). However, there were critics of this agenda due to the recognition that the process was carried out by the “national and international elites, with scarce information and participation of citizens, including teachers and specialists in education” (Stromquist, 2007, p. 260). The

international promise of EFA was reconfirmed in Dakar 2000 (Naseem and Arshad-Ayaz, 2007; Stromquist, 2007), and the agenda about access to education was complemented by an equal emphasis on quality of education, as Naseem and Arshad-Ayaz (2007) recognize:

While the World Declaration on EFA (Jomtien, 1990) did recognize the importance of quality education, it neither fully defined nor fully developed the notion. It was not until the Dakar Framework of Action in 2000 that the ‘quality’ aspect of education was recognized equally important as the ‘access’ dimension. The Dakar Framework affirmed that quality was ‘as the heart of education’ (UNESCO, 2005, p. 29). The Dakar Framework articulated the notion of quality along four dimensions: quality of learners (healthy and motivated), quality of the process (competent teachers using active pedagogies), quality of content (relevance of curricula) and the quality of the system (good governance and equitable resource allocation) (UNESCO, 2005, p. 29). (Naseem and Arshad-Ayaz, 2007, p. 76).

Despite this focus, as these authors affirm educational quality (EQL) has been understood as an ambiguous notion depending on the approach used to define it. In other words, although there is consensus about the importance of improving quality, there is no clear consensus in its definition.

Moreover, in 2000 UNESCO defined the Millennium Development Goals (MDG), consisting of eight goals for reaching global improvement in the areas of poverty, health, environment, childhood, gender and education (UNESCO, 2000; UN, 2010). Concretely, two goals are defined for education, which are analyzed in the following chapter together

with those that the EFA movement has established in relation to the educational improvement. Stromquist (2007) remarks that the goals of MDG “match EFA objectives” (Stromquist, 2007, p. 260), and thus that it is relevant to analyze these agendas simultaneously to explore how their discourses interact at different levels.

These main challenges for impacting the welfare of the human beings and the planet have been revisited recently in the MDG Report (UN, 2010), acknowledging that:

Policies and interventions will be needed to eliminate the persistent or even increasing inequalities between the rich and the poor, between those living in rural or remote areas or in slums versus better-off urban populations, and those disadvantaged by geographic location, sex, age, disability or ethnicity. (UN, 2010, p. 5).

It is vital to mention that the MDG agenda is supported by many international organizations, such as the Food and Agriculture Organization (FAO), the World Health Organization (WHO), ILO, WB, IMF, OECD, and WTO, among others. Additionally, Spring (2009) states the importance of other organizations such as nongovernmental organizations (NGOs) as well as the multinational corporations supporting the EFA movement (Spring, 2009, p. 33).

2.2.2.4 From literacy to (critical) multiple literacies: a relevant agenda for OECD and UNESCO

From the OECD perspective (OECD and UNESCO, 2003), a Program like the Program of International Student Assessment (PISA) is related to what they called *the literacy skills for the world of tomorrow*. In this global initiative, the main preoccupations are about the future of students in the knowledge and information economy/society in

terms of their acquisition of needed skills. OECD and UNESCO's (2003) joint report exposes the differences and educational gaps around the world as an invitation to analyze educational policies in different countries. The case of PISA is relevant in the context of this research because it refers directly to the literacy agenda¹¹ that has been established and disseminated through MDG and EFA initiatives.

Specifically, PISA assesses three kinds of literacy (OECD, 2002):¹² a) *reading literacy*, the ability to understand, use and reflect on written texts in order to achieve one's goals, to develop one's knowledge and potential, and to participate effectively in society; b) *mathematical literacy*, the capacity to identify, understand and engage in mathematics, and to make well-founded judgments about the role that mathematics plays in an individual's current and future private life, occupational life, social life with peers and relatives, and life as a constructive, concerned and reflective citizen, and, c) *scientific literacy*, the capacity to use scientific knowledge, to identify questions, and to draw evidence-based conclusions in order to understand and help make decisions about the natural world and the changes made to it through human activity.

In Spring's view (2009), PISA has played a significant role promoting "global standardization of education [and] potential for determining the curriculum content in the areas tested which are mathematics, reading, and science" (p. 57). These standards have been elaborated according to the objectives and necessities of the global economy (p. 62),

¹¹ It is necessary to remark that PISA in some way represents a trend that can be found in other international tests developed by other IOs preoccupied by literacy, numeracy or scientific literacy improvement. For instance, Baker and LeTendre (2005) analyze the case of the Trends in International Mathematics and Science Study (TIMSS) developed by the International Association for the Evaluation of Educational Achievement (IEA), as another international test influencing educational practices and national definitions.

¹² Definitions extracted from the statistical glossary in Education at a Glance, OECD, Paris, 2002, Glossary: <http://stats.oecd.org/glossary/detail.asp?ID=5420>; <http://stats.oecd.org/glossary/detail.asp?ID=5388>; and <http://stats.oecd.org/glossary/detail.asp?ID=5425>

reducing the understanding of literacy to a functionalist approach that does not consider differences among countries and cultures (p. 63).

Concretely, regarding the learning outcomes attained by students in Canada and Chile in PISA 2000 (focused on reading), the Council of Ministers of Education, Canada (CMEC, 2007) affirms that Canada had an excellent performance, and “only one country –Finland- scored higher than Canada (CMEC, 2007, p. 62). In the case of Chile, the results obtained in PISA reflect in a more accurate form (compared to the general literacy rates declared to UNESCO) the challenges of the country in literacy. Although the average of the country is higher than the average of other Latin American countries that participated in PISA 2000, Chile’s performance was far below of the average of the OECD countries (Ministry of Education of Chile, 2003).

On the other hand, UNESCO’s notion of literacy has faced a transition from approaching mainly reading and writing in the past to considering it in this century as “a metaphor for many kinds of skills” that are in the field of technology, media, health, information. In this sense, UNESCO acknowledges the notion of ‘multiple literacies’ (UNESCO, 2005, p. 14) and that literacy is at the heart of the lifelong learning (UNESCO, 2005, p. 16).

Yet it is important to recognize that literacy, in terms of basic reading and writing, is still considered essential, especially when taking into account that people who live in conditions of poverty face the higher rates of illiteracy. Consequently, in 2001 UNESCO established the International Plan of Action for the period 2003-2012 in the context of the adoption of the General Assembly resolution “United Nations Literacy Decade:

Education for All, which uses the slogan “Literacy as Freedom”.¹³ In this plan, Literacy is understood as:

crucial to the acquisition, for every child, youth and adult... and represents an essential step in basic education, which is an indispensable means for effective participation in the societies and economies of the twenty-first century... is essential for achieving the goals of eradicating poverty, reducing child mortality, curbing population growth, achieving gender equality and ensuring sustainable development, peace and democracy. (UNESCO, 2002, p. 3).

In this sense, literacy is assumed by UNESCO to be a crucial factor that would allow greater benefits to the world, from peace to insertion in the economies and eradication of poverty. This is particularly relevant if we consider the statistic proportioned by UNESCO, which states that one in five adults is still not literate and two-thirds of them are women, while 75 million children are out of school.¹⁴ Thus UNESCO considers *Literacy as a Right*, but at the same time, literacy supports economic development: “Investing in adult literacy programs as well as in schools makes economic sense” (UNESCO, 2005, p.14).

Moreover, in relation to the introduction of the notion of literacies, and under the assumption that we live in a knowledge economy/society with an increasing incorporation of the Information and Communication Technologies (ICTs), UNESCO states that:

literacy requirements continue to expand regularly. It's necessary to learn new literacies... literacy policies and programs today require going beyond the limited

¹³ See <http://www.unesco.org/en/literacy/un-literacy-decade/>

¹⁴ See <http://www.unesco.org/en/literacy/>

view of literacy that has dominated in the past. Literacy for all requires a renewed vision of literacy... (UNESCO, 2002, p. 4)

Although literacy has been assumed a part of the national educational challenges, it is necessary to remark the existence of crucial differences between countries, in terms of economic, cultural and educational background. On the one hand, Chile declares in the Global Digest Report of the UNESCO Institute for Statistics (UNESCO, 2010) that the literacy rate reached 99.2% in youth and 98.6% in adults. But this situation can be at least questioned considering the definition that the country has established, according to the UNESCO metadata: “To calculate the literate population, persons who declare having 2 years or more of schooling are considered literate, under the assumption that only persons with this attribute are able to read and write” (UNESCO Institute for Statistics: April 2010 Data Release (Reference years 2005-2008)). In my opinion this assumption represents an extreme minimum that must be rethought in order to establish more precise challenges in this area. In the case of Canada, information on literacy rates is not presented in the UNESCO statistics.

a) Examining the notion of Critical Literacy

While UNESCO and OECD strongly point to the importance of literacy improvement, at this point it seems relevant to present the notion of critical literacy, beyond the instrumental or functional understanding of literacy. Indeed, the critical literacy approach highlights the importance of connecting literacy goals with curriculum content, the kind of knowledge and discourses transmitted, as well as the power relationships within the educational, social and economic systems. As Darder, Baltodano and Torres state (2009),

Teachers and students together deconstruct and demystify the curriculum... teaching of literacy and orality can either function as a mechanism to perpetuate asymmetries of power and privilege in the larger society or emancipate opportunities for transformative education. (Darder, Baltodano and Torres, 2009, p. 279).

In this regard, Shor (2009) recognizes that critical literacy must analyze the process of reading and writing as something “constructed within specific power relations” (Shor, 2009, p. 282). In Shor’s (2009) view, a critical literacy approach has to interrogate the knowledge received through the curriculum: Is this knowledge questioning “inequalities and developing activist citizenry” and the status quo? (Shor, 2009, p. 290-294). Thus, presenting the critical perspective of Aronowitz and Giroux (as cited in Shor, 2009, p. 298), Shor reveals the main connection between specific economic, political and social interests and how the knowledge transmitted serves them. In this sense, Kretobics (as cited in Shor, 2009, p.298) recognizes the relevance of giving more than functional tools to students, in terms of providing them “conceptual tools necessary to critique and engage society along with inequalities and injustices” (Shor, 2009, p. 298). Finally, another relevant view is related to Freire’s vision (as cited in Shor, 2009, p. 299) who claims the necessity for students and teachers to learn “how to command the dominant language, in order to survive in the struggle to transform society” (Shor, 2009, p. 299). The relationship between power and knowledge in education is also presented by McLaren (2009), who states, “...we can consider dominant discourses (those produced by the dominant culture) as ‘regimes of truth’, as general economies of power/knowledge...” (McLaren, 2009, p. 72-73). And in these regimes of truth, the curriculum plays an key

role in the preparation of students for the adoption of “dominant or subordinate positions in the existing society” (McLaren, 2009, p. 74).

2.2.3 Networking to disseminate global educational discourses: How are IOs interacting and supporting educational agendas?

Although the different IOs represent particular interests and objectives –as presented above-, there are some common areas where they are involved in the educational sphere. Indeed, Spring (2009) states a marked trend among IOs such as UNESCO, OECD and WB to promote global educational discourses mainly in terms of “human capital, lifelong learning for improving job skills, and economic development” (Spring, 2008, p. 332). Spring (2009) remarks the importance of “networks of policymakers and scholars” of IOs promoting and disseminating these discourses (p. 8).

Complementarily, Peters (2007) recognizes a marked trend toward the formation of *knowledge networks* in the economic sector, where there is open collaboration between governments, higher education, business and local communities. To Peters (2007), the key element of these networks is that “the firm becomes a learning organization” (p.135), and for reaching its economic objectives it needs to work and innovate together with other organizations from the private and public sector. This might be the way in which networking has been consolidated in the KE. The Actor Network Theory presented below provides interesting elements to understand how this has affected the educational sphere.

2.2.3.1 Actor Network Theory (ANT) and the dissemination of the Education-Economic Growth Black Box (EEGBB)

According to Resnik (2006), the convergence of global discourses on education based on economic principles can be better understood using the postulates of the Actor Network Theory (ANT); “a theory of knowledge and of agency —[that] enables us to understand the formation of the Education–Economic Growth Black Box [EEGGB]” (p. 175) as a ‘subdiscipline’ elaborated by economists of education that defined the latter as a crucial factor for the economy.¹⁵ Specifically, ANT recognizes that different actors have interests and they try to convince and become allies with others (p. 178). Resnik (2006) notes the work of Bruno Latour, who has explained the role that scientists have in elaborating and promoting ‘black boxes’ as “knowledge that is accepted and used on a regular basis as an unquestioned matter of fact” (Resnik, 2006, p. 179).

Resnik (2006) understands EEGGB as a “network in which UNESCO, the OECD, and the econometric economists of education participated” (p. 175) together in collaboration with other international agencies in order to improve and disseminate specific associated discourses. Concretely, Resnik (2006) highlight that the Black Box is founded on three main discourses: 1) human capital; 2) residual factor; and 3) education planning. In Resnik’s (2006) view, “the education-economic growth discourse became the basis of educational policies throughout the world—a fact that contributed to the expansion and empowerment of international organizations” (p. 175). Briefly, from the human capital perspective, education became an economic investment and started to be analyzed in terms of its costs and rates of return (p. 181).

¹⁵ According to Resnik (2006) this approach has its origins in the 1950s, and later it “became institutionalized in international conferences, study groups, international organizations documents, recommended policies” (p. 180). The author remarks as a milestone that in 1960, the United Nations also legitimated the discourse of education as fundamental for economic development in its resolution of the General Assembly (Resnik, 2006).

According to Resnik (2006), in the neoclassical growth theory the residual factor basically hypothesizes the difference between real growth of the Gross National Product and the estimate growth as a product of the educational dimension (p. 182). Also, the residual factor considers the individual income “as indicator of the return on education” (p. 183). And in terms of *educational planning*, Resnik (2006) points to the role that experts play in order to: a) respond to the “social educational demand” of countries; b) know the cognitive skills, capacities and knowledge that students acquire at different stages of the schooling process; c) produce a “comparison” between educational systems; and d) understand the connection between education and the needs of the labour market using the “manpower approach” (p. 183).

So, within ANT, International organizations can be analyzed as actors with specific interests producing (not only reproducing) and promoting specific discourses (Resnik, 2006, p. 178). As repeatedly mentioned, those discourses in the educational sphere are referred to as the relationship established between education and economic development. Resnik (2006) explains the success and validity of those discourses as the result of the capacity of actors–networks involved in its establishment. This can be related with the establishment of certain discourses as truths within the educational sphere, in the sense that the education-economic growth approach has been established by specific actors and networks, especially economist and functionaries of IOs such as UNESCO and OECD (p.179).

What lies behind the acceptance of these discourses of the EEGBB is the support offered by the scientific principles by which it is defined and the possibility of presenting a neutral political discourse: “objectivity, neutrality, and calculability—suited the

objectives of international organizations: to promote and coordinate international cooperation on education problems in an apolitical manner” (Resnik, 2006, p. 185).

Indeed, as presented in the following sub-section, educational policies and discourses cannot be understood as apolitical, precisely because those policies are strongly based on political definitions, values and beliefs.

2.3 National policymaking processes in education and the changing role of the nation-states

2.3.1 The policymaking process in education: Priorities, interests and power relationships

In this research, to define public policy I use the general definition stated by Fowler (2004): “the dynamic and value laden process through which a political system handles a public problem. It includes a government’s expressed intentions and official enactments as well as its consistent patterns of activity and inactivity” (Fowler, 2004, p. 9). Fowler (2004) presents a useful model that considers six policy stages: 1) Issue definition; 2) Agenda setting; 3) Policy formulation; 4) Policy adoption; 5) Implementation and; 6) Evaluation (Fowler, 2004, p. 14).

In Fowler view’s, stages 1 and 2 would be “the most important steps in the entire policy process, irreversibly influencing what happens next” (Fowler, 2004, p. 169). In the first stage –issue definition- different organizations “actually compete fiercely with each other to have their definitions of education problems accepted by other participants in the issue-definition process” (Fowler, 2004, p. 175). These institutions are universities, foundations, think tanks, policy networks, education associations and corporations, among others, depending on the national realities. In this competition to influence the

definitions, many strategies and means are used to disseminate new ideas, from publications to education policy workshops and conferences (Fowler, 2004, p. 177).

Fowler defines an issue as official policy when it is part of the government's policy agenda, a highly competitive process;

In the broadest sense, the education policy agenda includes all issues under discussion at professional conferences, in education journals, among well-informed educators, in the mass media, among the general public, and among government officials (Kindgon, 1995)... if an issue become official policy, it must eventually reach the government policy agenda. (Fowler, 2004, p. 181).

These stages are useful to analyze international discourses that at some point become or influence official policies when considered by national governments' agendas.

2.3.2 Power relationships and the interconnection between territorial levels

It is also relevant to recognize the power dimension of educational policy, according to Fowler (2004): "Possible effects [of exercising power] include causing an actor to act, preventing an actor from acting, and shaping the nature of the actor's action" (Fowler, 2004, p. 27). The faculty to exercise the power is related to the possession of appropriate "resources, such as money, social status and information" (Fowler, 2004, p. 27). The relationship of power is expressed in the way that educational policies are defined and implemented at different territorial levels, and through the kind of power that institutions and actors exercise, from the use of physical or psychological force/violence to economic pressure, and authoritative or persuasive means (Fowler, 2004). For instance, at the local level, the school administrators exercise "economic dominance and legal authority" (p.41) in order to implement those policies that have been defined. Nevertheless, at the

same time different actors, from students, parents and community organizations to principal and educational authorities, have some degree of power to influence the decision-making process (Fowler, 2004).

It is important to be cognizant of the complex relationship between the territorial levels in the policymaking process, extending to the international scale. Firstly, in spite of the importance of the global forces shaping educational systems, the national sphere is still principal to considering how policies represent systems of values “legitimizing political decisions” (Ball, 1998, p. 124). Fundamentally, there are two related agendas influencing national educational policies, one directly related to national economic interests (“the increasing colonization of education policy by economic policy imperatives” (p. 122)), and the other to the loss of state control over education (p. 125). In Ball’s view, “national policy making is inevitably a process of bricolage: a matter of borrowing and copying bits and pieces of ideas from elsewhere...” (p. 126). There is a process of recontextualization and recreation of educational policies that occur not only at the state but also at the pedagogic level. The idea of recontextualization puts emphasis on the different ways that countries adopt and develop new policies, and Ball notes the interaction of new policies with the previous ones. The relationship of power is always present in this process, because the new policies “enter rather than simply change existing power relations and cultural practices” (p. 127).

In a similar fashion, analyzing the case of the Peruvian adoption of EFA goals, Stromquist (2007) states the existence of global economic and political forces affecting national educational systems and pushing for reaching convergence among the countries. This situation is also acknowledged by Spring (2009), who states that the idea of “global

homogeneity of the curriculum is the result of national policy elites, particularly in developing countries” (p. 9).

Nevertheless, Stromquist (2007) also states that there is “a distinction between policies as discourses and policies as mandates for action” (p. 258). Indeed, while some convergence is expected through the globalization of education (and to some extent “toward increasing forms of homogenization” (pp. 258-259) in relation to global challenges and objectives, nations give new senses and meanings to the global policies. Thus, countries may act differently according to their own definitions, and the implementation educational policies may vary within the national bureaucracies (p.259).

2.3.3 Focus on governance rather than state

Dale (2005) recognizes that beyond the global trends, educational decisions are made by nation-states. However, those decisions are indeed affected by other levels and by the context in which they are made. Dale uses the notion of “methodological nationalism” to interrogate the ‘natural’ assumption of the nation-state boundaries (p.124) and presents an approach focused on the governance process, understood as “the coordination of the coordination of the work of governing” (p. 129). Essentially, the main argument is that the governing process occurs among different levels and with the participation of many actors, and it is not only controlled by the state. Dale proposes a model in which activities of education are divided into “funding, provision, ownership and regulation, and these activities might be carried out by the market, the community or the household as well as by the state (see Dale, 1997)” (p. 129).

In the context of the global knowledge economy, Dale (2005) states the crucial role of the state in regulating the conditions of the government, but at the same time he remarks how its role has been transformed in this new scenario:

(a) in an era of globalization and regionalization such discretion [of the state] is drastically limited; crucial decisions that were once taken at national level are now taken in supranational [spheres] (e.g., exchange rates and the Euro); and (b) the institutions themselves are no longer (if they ever were) shaped exclusively by national path dependencies, but also by their location and roles in global and/or regional economic interdependencies. (p. 130).

According to Dale (2005), the former power of the state for setting the agenda in education cannot be taken for granted. In his view, different issues can now be defined at a different scale, the international one being of great relevance. Thus, he understands the current process of governance as the overcoming of the above mentioned methodological nationalism in order to consider a “pluri-scalar nature of educational governance” (p. 132), as presented in the following figure.

Figure 2.3 Pluri-scalar governance of education (Dale, 2005, p. 132)

SCALE OF GOVERNANCE	GOVERNANCE ACTIVITIES			
	FUNDING	OWNERSHIP	PROVISION	REGULATION
SUPRA-NATIONAL				
NATIONAL				
SUBNATIONAL				
INSTITUTIONS OF CO-ORDINATION				
STATE				
MARKET				
COMMUNITY				
'FAMILY'				

Figure 1. Pluri-scalar governance of education

As Dale states, the diagram's purpose is to show that "education policy can no longer be seen as the exclusive preserve of individual nation-states" (Dale, 2005, p. 132). Indeed, considering the relevance of the global, national and sub-national as different levels "not being zero-sum," He argues for the existence of a new division of labour between those levels, while acknowledging that international organizations have the strongest role in shaping the educational agenda (p. 133).

2.3.4 Decentralized control in the globalized context

Countries' responses to international discourses in education may vary depending on local contexts, and it is appropriate to recognize the same distinction within the countries, where national policies are adopted at the local or sub-national levels. At this point, the view presented by Baker and LeTendre (2005) is relevant in relation to the shift from a

centralized control of education in the mid 1970s to the current trend toward the opposite, the *decentralized control*. According to Baker and LeTendre (2005): “Governance of schooling in many nations now functions under a... combination of centralized and decentralized processes coexisting in a kind of administrative truce... far more complex... from a simple notion of globalization of decentralization”. (p. 135).

The current trend in education (as well as other spheres) considers decentralization to represent a transference of responsibilities and of power to the local governments and at the same time a certain empowerment of the citizens who can exercise more democratic forms of participation and be part of accountable processes (p. 136). Nevertheless, as centralized trends occur simultaneously with the trends to decentralize the administration, the situation creates tension within the system (p.148). To some extent, these authors project a situation of tension within the globalized context, promoting a reflexive adoption of the global educational agendas defined by the wealthier nations. Thus, acknowledging that international agencies change their emphases over the time, the authors recommend to national authorities and administrators to analyze the pertinence of the global discourses in relation to their own realities within the countries. In other words, they encourage national administrators of the developing world to interrogate those discourses and policies coming from the wealthiest countries, because these agendas might represent the interests of the latter (Baker and LeTendre, 2005, p.149).

2.3.5 Planning and Implementing Educational Reforms: Top-down and Bottom-up strategies

As mentioned above, despite the importance of the global discourses and agendas in education, there is consensus about the necessity for considering national and local voices

in order to make sense of the educational policies proposed. This implies the active involvement of different actors and institutions in the educational processes that allow to adequate balances in designing and implementing policies. Fullan (1998) points to the relevance of considering local actors, teachers, parents, principals, and acknowledging their influence in the students' learning. In his view (1998), it is necessary to consider the “local life” or “bottom half” and connect it with the “top half.” Fullan (1998) also refers to the necessity of establishing a rapport between the top-down and bottom-up strategies to successfully implement an educational reform, while recognizing this as a main challenge faced by public policies. Fullan (2005) identifies three main levels within the educational system: a) School; b) District; and c) State. He calls it the “Tri-Level Solution,” where the state needs to transform its traditional pattern of actions. At the state level, active leadership is needed to adopt the transformation of the system, while at the same time it is important to redefine the relationship with the other two levels, towards more transparent and participative forms (p.5).

The importance of the involvement of the local level (districts and schools) is also noted by Chrispeels (1997). In Chrispeels' view, it is necessary to consider these levels throughout the entire process of policy development, not only in the implementation but also in the design of alternative policies and to give feedback to the national state's policies. Chrispeels (1997) also states that those policies have to make sense and be positively and proactively assumed by the actors of the school community -teachers, students, principals and administrators- if some educational improvement is expected. It is also relevant to acknowledge the differences among districts and schools, between those that have the “will and capacity” and those that do not (p. 468).

Concretely, Fowler (2004) presents the PRINCE¹⁶ model developed by Coplin and O’Leary (as cited in Fowler, 2004, p. 43) for analyzing the context in which educational agendas and policies are defined: “The major value of the PRINCE exercise is not that it predicts the future but that it suggests strategies for altering an unfavorable balance of power” (p. 45). This model promotes the identification of the actors involved and the relative capacity to influence and exercise power in order to reach consensus around some discourses (Fowler, 2004). In this sense, I think this model represents an opportunity for opening dialogues and giving voices to those normally silenced: the disempowered groups. However, a main challenge is giving them a real opportunity to participate in the decision-making process by acknowledging the power relationships among different participants.

Looking for a balance between the top-down and bottom-up strategies refers to the involvement of different actors and levels in the educational definitions. But it is also relevant to interrogate how educational reforms are considered currently as a main mechanism for improving the educational systems and the students’ learning outcomes.

2.3.6 Educational reform as a permanent condition

The processes of participation and involvement of different actors in the improvement of the educational system leads to questioning the way that educational reforms operate. According to Baker and LeTendre (2005), it is necessary to recognize that reforms are always interconnected with other past reforms, and that they will influence future reforms (p. 164). These authors affirm that reform represents in itself an institutional value, and

¹⁶ According to Fowler (2004), the name is taken from Machiavelli’s book, *The Prince*. The model analyzes a determinate issue statement: a) identifying actors; b) identifying positions; c) assessing power; d) assessing priority; and e) interpreting (Fowler, 2004, p. 44).

this situation implies a paradox: when institutions attain some power and organization, as in the case of schools, they tend to resist change and meanwhile “constant educational reform seems to move in the opposite direction” (p. 167), which is the promotion of innovation and change within the system. In Baker and LeTendre’s view (2005) continuous reforms ultimately produce “not radical restructuring” but “[a] certain dynamic of power” (p. 168).

In my view, the interesting point is that the process of reforming may be more related to the imposition of certain social values rather than to the “success” of the policies and agenda installed throughout the decision making process. In this sense, it is possible to interrogate educational reforms and related policies in their intended objectives, but also in relation to the processes that those reforms install and reproduce within the system. For example, it is possible to interrogate critically those reforms that currently open new markets for incorporating providers of goods and services from the for-profit sector in the educational sphere.

2.4 Education and discourses of development

2.4.1 Contextualizing the discourses: How do these trends and processes differently affect the educational systems around the world?

The definition of a global agenda in education has not been exempt of controversies. Indeed, as Olssen, Codd and O’Neill (2004) recognize that as evident in the case of different responses of the welfare states of Scandinavia, and the Anglo-Saxon or continental European nations countries do not respond uniformly to the trends delineated above. The context where these economic, political and cultural changes are carried out must be considered.

My personal experience from a “developing” country has lead me to believe that acknowledgement of the differences is a starting point to understand the impact of the global trends. In this regard, Ghosh (1976) presents a relevant discussion about the way that development –as both a means and an end- is understood in the relationship of underdeveloped or developing countries with developed countries through international aid. In this relationship, Ghosh (1976) identifies two paths for understanding how development might occur: a) the developing world progresses “by accepting ‘modern’ skills, behaviours and attitudes with the help of capital and technical assistance from the developed countries” (p. iv); or b) development occurs through the emancipation of the “imperialistic exploitation [of the underdeveloped or developing] resulting in lack of self respect, dependency, and powerlessness in all spheres” (p. iv). In the latter case, co-operation replaces technical assistance. In Ghosh’s view, education plays an important role, with different emphasis depending on the path of development: in the first case, “the attention is given to human capital in the process of development... [its] major component is in the form of more education of higher quality” (p. 94); in the second, the countries can be “economically and intellectually colonized” (p. 98) and the transformation and the socio-economic development of society is produced “through radical social change and democratization” (p. 100).

Although it is necessary to recognize that there are numerous benefits associated with the current relevance of the educational sphere and the opportunities made available with educational reforms (and to some extent the way that the educational systems are *not radically* transformed), from another perspective it seems pertinent to analyze these global agenda in the context of a neoliberal economy that reproduces social injustices, the

gaps and differences between and within the peoples of the dominant and dominated countries in the international order.

Highly influenced by the discourses of IOs, national systems have undertaken some educational challenges. The improvement of literacy is one principal agenda, including the notion of *multiple literacies* in the last decade, which has been understood as a major vehicle to reach and promote the development of countries, regardless of whether they are in the “developed” or “developing” world. Indeed, as I presented above, literacy is at the core of UNESCO discourses and that of other IOs concerned with education. Thus, these agenda have to be interrogated, since the contexts in which they are decoded and interpreted differs in terms of the national and international educational gaps based on class, race, gender, ethnicity and nationality, among others. How do these discourses about access to education and improvement of literacy rates promoted by UNESCO and OECD affect their members in various regions of the planet in different ways? Are these discourses and international goals pertinent to different realities? Or to the contrary, do they reinforce relationships of privilege of some over disadvantaged others, between and within the countries?

These questions are related to the acknowledgement of the power relationships between and within countries, and the way that national and local systems of education carry out the process of policy development. In this sense, there are always alternatives for adapting, resisting or even rejecting policies imposed from top to bottom. Indeed, considering the local perspective, Spring (2009) states, “local school officials and teachers do not simply dance to the tune of global flows and networks. First, they might give meaning to the influence of global educational policies and practices through the

lens of their own cultural perspectives” (p. 7). The recognition of the cultural and social context in this way appears as a crucial dimension at the moment of decoding the global discourses on education. Spring (2009) also remarks the position of culturalist scholars in this regard, mentioning the work of Kathryn Anderson-Levitt, who recognizes that the “appearance of homogenization of global schooling in reality [is resisted and transformed by] teachers and local school officials” p. 15)

Furthermore, the relationship of power and knowledge developed by Foucault (1980) is present at the moment of proposing or imposing any agenda. It is directly related to the idea exposed by Resnik (2006) about the role of the IOs’ networks that produce and disseminate certain discourses. These agendas (OECD, UNESCO) in education are promoted as agendas of development (whether their focus is economic or has a more holistic perspective), where the developed world has an evident advantage in terms of what has been already reached in terms of educational outcomes. The knowledge produced and disseminated is validated by national educational systems, thus reproducing certain hierarchies of *knowledges*, or as Hans Weiler states “where one form of knowledge is privileged over another” (as cited in Spring, 2009, p. 13).

In this sense, Robinson-Pant (2001) argues for the acknowledgment of an ideological dimension of the educational planning and the policymaking process. She recognizes the presence of political agendas of different development agents. In her view, there is a gap between policy and practice explained in part by the existence of an interface between the ‘developed and the developer’ (p. 312), and that is related to the question raised by anthropologists who have worked on colonial discourses, about how truth and knowledge are defined (p. 314). In order to initiate a new relationship between ‘developed and the

developer,’ in Robinson-Pant’s view (2001), the deconstruction of these ideological development’ discourses is necessary.

The idea of development as an attempt to simulate the developed world (where countries also assume the challenge of improving the conditions of “developing” countries according to Baker and LeTendre (2005)) not only defines a trajectory that has many cultural, economic and political obstacles, but that can also reproduce the privileges of some countries over others. At the national level, the agenda of internal development is also promoted, and, in the interesting view of Spring (2009), is about the competition of discourses for establishing educational models. So, Spring acknowledges Anderson-Levitt in recognizing the competition between the ‘human capital world model’ and the ‘progressive education world model’ (p. 16). Spring (2009) also adds the religious and the indigenous models of education.

In this way, at the national and local levels there may be a possibility to develop different visions of education, depending on the cultural contexts in which those discourses operate. It is the idea of “borrowing and lending” (Spring, 2009) that educational policymakers are applying to define their national and local systems. According to Spring (2009), however, “South American countries have been influenced by Spanish colonialism and human capital models” (p. 23). Yet at the same time, Spring recognizes cases such as Paulo Freire, a Latin American example that “demonstrates that the global flow of educational ideas and institutions is not one way” (p. 23). In this sense, he interestingly connects the progressive education model with the work of Freire and John Dewey, promoting “social justice and change in contrast to the emphasis on economic efficiency and growth of the human capital model...” (p. 27).

2.4.2 The role of the comparative education approach linking the local and the global: Educational Quality (EQL) and contextualized education

According to Dale (2005), comparative education historically promoted and prescribed to nation-states the paths for states to reach ‘modernization’ and economic growth “adopting the values that had been adopted by the developed nations” (p. 126). In a similar fashion, Hayhoe and Mundy (2008) state that many countries around the world indeed had their “education systems imposed by Western colonizers” (p. 5) and they acknowledge the responsibility of comparative education under the Western paradigm for almost two centuries (p. 9). Nevertheless, Hayhoe and Mundy (2008) recognize an important shift produced in part by the appearance and influence of post-modernist and post-colonial theories and the increasing “awareness of global topics such as equality, peace, and cultural and ecological sustainability” (p. 9). The result is the current aim of the comparative approach precisely seeking the connection ‘between the local practices and global issues’.

Thus, although it is necessary to recognize the existence of universal conditions for defining EQL, according to Naseem and Arshad-Ayaz (2007), any holistic understanding of quality in education must give importance to the local contexts in which the educational processes occur. This approach, that they call the ‘post foundational perspectives’ (Naseem and Arshad-Ayaz, 2007), opposes meta-narratives and emphasizes “local (micro) narratives” that allow students to learn connecting the knowledge with their experience and it requires a “deconstruction of meta-narratives... to make the content of education more pertinent to the local reality and at the same time more

sensitive to the incorporation of insights from local knowledges” (Naseem and Arshad-Ayaz, 2007, p. 82).

Moreover, seen from a critical perspective (Petras, 2008; Spring, 2009), the promotion of a development agenda is understood as an imposition from the powerful side (some countries over others, or of the powerful interests within countries) and the reproduction of a colonial relation of domination. Thus, according to Spring (2009), postcolonial or critical theorists understand the global discourses of the knowledge economy as ideas imposed by IOs in order to interconnect the core countries –USA, EU, Japan- with those that form the periphery (developing and underdeveloped countries) (p. 13). In this relationship, the developed countries promote and transmit their values to the developing world through the schooling system. “From this perspective, globalization of education is part of an effort to impose particular economic and political agendas that benefit wealthy and rich nations at the expense of the world’s poor” (Spring, 2009, p. 13).

Similarly, Petras (2008) analyzes the processes of liberalization and deregulation that characterize the global economy, and critically interrogates the globalization process and the ‘world development’ enterprise as an imperialist political project oriented by specific socioeconomic interests (p. 35). In this scenario, the capacity of local actors’ agency acquires more relevance as alternative approaches to understanding development, and there is a “search for a community based and localized form of participatory development that is at once ‘socially empowering’ and ‘transformative’” (p. 45).

2.5 Understanding the global discourses in education: from the influence of international organizations in national educational definitions to the necessity of local agency

As I mentioned in the beginning of the chapter, the socioeconomic and cultural trends and theoretical perspectives presented above are highly interconnected. The global–local can be understood as a complex dialectic relationship, combining discourses and actual decisions acting simultaneously in different directions, as Dale (2005) recognizes in his pluri scalar model of educational governance which includes the sub-national and the supranational, while simultaneously considering the involvement of several agencies or institutions in this process.

On the one hand, global agendas –with actual regulations, frameworks and policies affecting national realities— have been developed, installed and transmitted through international organizations that act above the individual nation-states’ interests. In one way, this can be seen as the establishment of the international order (or the ‘New World Order’ in Petras’ view), through the power and autonomy given to IOs such as UNESCO, OECD and WB to define and control international and national development.

Specifically, within the global discourses of IOs, the educational sphere becomes to a great extent a subsector of the economic sphere, under the predominance of discourses referring to the knowledge economy and the human capital model, to increase the competitiveness of countries and individuals within international and national markets. Economic growth appears as a final aim and education thus becomes instrumental to this purpose. Resnik’s (2006) view is particularly interesting here: that IOs’ networks

reinforce the production and reproduction of specific discourses as valid –scientific- knowledge.

On the other hand, although different authors (Ball, 1998; Dale, 2005; Leuze, K., K. Martens, & Rusconi, A., 2007) recognize the national level as key for the decision-making process within the educational governance process, it is also evident how these national decisions are (and have to be to some extent) aligned with those discourses of IOs. However, depending on the relationship established between the country and any particular IO, some variations are possible. In this sense, it is not the same to follow a commitment associated to a loan of the WB than a global challenge for overcoming poverty or improving access to education. As Stromquist (2007) recognizes, the situation is different at the national level when policies are presented as discourses rather than ‘mandates for action’ (Stromquist, 2007, p. 258). At the same time, it must be acknowledged that national elites who follow the mandates and orientations of IOs reach a better participation in the global context. According to Galtung (1972)’s structural theory of imperialism, which takes as its starting point the inequalities within and between the countries, this could be explained by the close relationship among elites of the world (the center of the developed and developing countries) responding to the same interests, in contrast to the situation of the peripheries within the countries, which are not connected among them and receive the mandates of their national elites.

Nevertheless, while it is possible to visualize this relationship among global elites, it must be acknowledged that within countries there are important differences in terms of the value system implied in the policy agenda established by national governments. Indeed, at this level there are opportunities for creating counter discourses from internal

discussions that consider multiple identities acting simultaneously. Certainly, the relationships of power –expressed in the socioeconomic status and political preferences but also through the dimensions of race, class or gender- within countries have to be considered to understand how the decision-making process occurs.

Furthermore, as some authors recognize (Abdi and Naseem, 2008; Petras, 2008; Spring, 2009) there is space for agency and empowerment of those situated at the local level. But once again, it must be acknowledged that at this level those differences defining the power relationships may reproduce the same situation of exclusion and social injustices presented at the international and national levels. In this sense, at the local level there are also local elites –in the form of local authorities or economically advantaged peoples- versus the local peripheries. Despite –or perhaps because of- these contradictions and dialectical processes expressed in the global-local, developed-developing, center-periphery or dominant-dominated relationships, points of encounter between actors may emerge, and in this process education plays the crucial task of making a difference.

Education has been understood in more pessimistic ways as well, as an opportunity to produce and create but also as an ideological apparatus of state control and socioeconomic and cultural reproduction (as Althusser (1971) and Bourdieu and Passeron (1977) have approached education). Yet it is this contradiction that allows one to think critically about the current dominant system in order to think about alternatives for improving the quality of education within countries, overcoming the idea of competition among students, teachers, schools, districts or nations and the instrumentalization of education by economic interests. While supporting universals and minimums required in

the current interconnected society, at the same time is necessary to leave space for local definitions.

Thus at the end, the question of improvement of the educational system is about the aim of this improvement: Education for what and for whom? This is the perspective I adopt in the following chapter when analyzing the goals established by UNESCO in the MDG and EFA initiatives. From the beginning, the complexity of these agendas must be stated, on the one hand because of the dynamic evolution of what is understood as educational and literacy improvement –overall, the latter has evolved toward the acquisition of multiple literacies-, and on the other hand, due to the relative dimension of what is considered minimum standards for considering educational systems of “good” quality and peoples as “literate or illiterate,” which vary among countries and societies. In any case, the assumption of educational and literacy improvement as main challenges make interesting discussions possible – both from the functional-reformist and critical-emancipator perspectives- in the educational sphere.

CHAPTER 3: UNESCO DISCOURSES: EDUCATION FOR ALL (EFA) AND THE MILLENNIUM DEVELOPMENT GOALS (MDG)

Introduction

The theoretical discussion presented above defines the structure of the analysis developed in this chapter. In this sense, I use the main themes elaborated in the previous chapter as a starting point: a) globalization and education; b) the role of international organizations; c) policy making in education; and d) development and education.

In this section, these themes are developed and elaborated from what is explicitly expressed in the UNESCO's texts¹⁷. Specifically, I alternate from the textual analysis towards the analysis of discursive and social practices (Fairclough, 1992, 1995) referred to in the documents¹⁸. More specifically, I consider nine texts produced by UNESCO in the period from 1990 to 2010 directly related to the EFA and MDG's agenda, and the objectives and themes proposed for this research¹⁹. The documents are the following:

1. World Declaration on Education for All – Framework for action to meet Basic Learning Needs – Adopted by the World Conference on Education for All - Jomtien – 1990 (UNESCO, 1990).

¹⁷ The data corpus was codified and organized using the qualitative software Atlas Ti. All the codes were grouped in four families corresponding to these 4 main themes. Nevertheless, it is important to remark that many codified data is not used in this research.

¹⁸ The subchapters 1 to 4 are elaborated alternating description and interpretation from the discourses, with a focus on what UNESCO's texts are 'saying' and then interrogating those discourses. In the subchapter 5, I briefly analyze UNESCO discourses integrally in order to outline possible answers to the research questions stated initially.

¹⁹ For this reason, relevant topics presented in these documents are not analyzed in this research in spite of its relevance, as the gender agenda for education, explicitly remarked in EFA and the MDG. On the contrary, I consider transversally the issues of educational quality and literacy as well as other related to the process of policymaking in education. Also, to have documents from the period 1990-2010 allows the analysis of the evolution and transformation of the discourses, as well as the identification of the different emphasis that they have had during this time.

2. Education for All: Meeting our collective Commitments - The Dakar Framework for Action – Adopted by the World Education Forum – 2000 (UNESCO, 2000).
3. United Nations Millennium Declaration – Resolution adopted by the General Assembly - 2000 (UN, 2000).
4. Roadmap towards the implementation of the United Nations Millennium Declaration – Report of the Secretary General – 2001 (UN, 2001)
5. Education for All: The Quality imperative - Global Monitoring Report (GMR) - (Summary) – 2005 (UNESCO, 2004)
6. Education for All: Literacy for life - Global Monitoring Report (GMR) - (Summary) – 2006 (UNESCO, 2005).
7. Education for All: Overcoming inequality: why governance matters - Global Monitoring Report (GMR) - (Summary) – 2009 (UNESCO, 2008).
8. The Millennium Development Goals (MDG) Report – 2010 (UN, 2010).
9. The central role of Education in the Millennium Development Goals (MDG) – 2010 (UNESCO, UNICEF, State of Qatar and Save the Children, 2010).

It is important to point out that MDG and EFA agendas are highly interconnected, or in Stromquist's words, the goals of MDG "match EFA objectives" (Stromquist, 2007, p.260). While the first is a broader agenda representing the main challenges to the development of the humanity recognized by the UN in 2000, the latter is focused on the current challenges that educational systems face around the world. Accordingly, the MDG agenda can be understood as a general umbrella under which EFA (which started one decade before MDG) has been situated since the beginning of the new millennium.

Precisely because of the interrelation established between both agendas, it is interesting to analyze how one might be influencing the other, and the international scenario in which this occurs. However, it should be noted that the main focus is put on EFA agenda, because it represents the specific educational challenges identified by UNESCO.

Following the main postulates of Fairclough (1992, 1995) the method used in this chapter for analyzing the documents is Critical Discourse Analysis (CDA).

Fundamentally, the identification of three levels of analysis -textual, discursive and social- allows the alternation between the description and the interpretation of the texts, and the interrelation and links to another social practices. The critical perspective is used in the analysis to permanently interrogate what Fairclough (1995) refers as naturalized conventions or ideological presuppositions within the discursive practices and its relation to hegemonic practices.

The EFA and MDG agendas can thus be understood as a “particular set of discourse conventions... implicitly embodies certain ideologies –particular knowledge and beliefs, particular ‘positions’ for the types of social subject that participate in that practice...” (Fairclough, 1995, p. 94). Simultaneously, the analysis is through the Critical Policy Analysis framework, considering the importance of UNESCO’s discourses in influencing policy development (Olssen, Codd and O’Neill, 2004).

In the following section, the data corpus is analyzed according to the structure and method briefly outlined above.

First, it is necessary to note that the following analysis does not attempt to evaluate the progress of the EFA and MDG. Thus, it is possible to present a general vision of the main breakthroughs as well as the challenges that these agendas face. Briefly, in relation

to EFA, UNESCO affirms that in 2000 there was “significant progress in many countries” (UNESCO, 2000, p. 8). In a similar way, optimistic announcements of progress in the poorest countries are made in 2009 and 2010: “Major advances have been made even in some of the poorest countries” (UN, 2010, p. 17) and “remarkable gains have been registered in many of the world’s poorest countries towards universal primary education and gender parity” (UNESCO, 2008, p. 3). Nevertheless, UNESCO is critical of the fact that even with some advance, the efforts will not be enough to achieve the goals, and recognizes that the goals that have receive more attention are related to primary schooling and gender parity, despite the importance of the rest of the EFA goals (UNESCO, UNICEF, State of Qatar and Save the Children, 2010, p. 8).

The EFA 2000 Assessment demonstrates that there has been significant progress in many countries. But it is unacceptable in the year 2000 that more than 113 million children have no access to primary education, 880 million adults are illiterate, gender discrimination continues to permeate education systems, and the quality of learning and the acquisition of human values and skills fall far short. (UNESCO, 2000, p. 8).

UNESCO mentions as one of the most common problems the slow pace of the educational improvement, fundamentally in terms of access (UNESCO, 2000; UNESCO, 2004; UNESCO, 2005; UNESCO, 2008), but also, in quantitative terms, UNESCO declares a reduction of adult illiterates from 800 million adults in 2002 (UNESCO, 2004) to 776 million (UNESCO, 2008). In this regard, the concern of UNESCO is in relation to the difficulty for achieving the goals in 2015, but mainly because of the importance of improving education and ensuring it as a right (UNESCO, 2008). And UNESCO

explicitly warns and asks the fulfillment of the commitments of the countries and donors (UNESCO, 2008).

3.1 Globalization and Education

3.1.1 Context of Globalization: Challenges and Opportunities

In the Dakar Framework of EFA (UNESCO, 2000), the notion of globalization is explicitly approached as both an opportunity and a challenge. Basically, UNESCO affirms that “globalization is generating new wealth and resulting in the greater interconnectedness and interdependence of economies and societies” (UNESCO, 2000, p. 14). In this context, the information technologies and the mobility of capital play a crucial role for challenging poverty and inequality. Although these processes open possibilities to benefit countries in the economic, social and cultural fields, UNESCO acknowledges the risks associated to some countries, groups and sectors. In its vision, the negative consequences are related to the exclusion of “the poor and the disadvantaged”. This coincides with the understanding of different authors presented above (Arshad-Ayaz 2008; Peters 2006, 2007; Stromquist and Monkman 2000; Stromquist 2002), in relation of the benefits of globalization for different nations and states.

As stated in UN MDG Road Map Towards the Implementation of the Millennium Declaration (UN, 2001) there are significant differences in the way that countries benefit economically from globalization. Regarding this, the gap between the developed and developing countries is acknowledged: how the former receive the benefits while the latter face some obstacles and difficulties. So, in most of the documents UNESCO emphasizes that the unequal distribution of benefits and problems are reproduced within the countries. At the national level, inequalities are based on categories such as

socioeconomic status, race or gender. The differences, thus, are in not only the developing but also in the developed countries, as mentioned in the EFA GMR – Overcoming Inequality (UNESCO, 2008), in relation to the gaps in preschool education:

Developing countries are not alone in struggling to make ECCE more equitable.

There are large disparities in pre-school provision among OECD countries. In France and some Scandinavian countries, for example, nearly all children are enrolled in pre-primary education, while the rate is six out of ten in the United States. Unlike most rich countries, the United States has no national standard or regulatory structure for ECCE, resulting in large variations in quality and coverage. (UNESCO, 2008, p. 13).

UNESCO's acknowledgment of the existence of large inequalities within and between the countries is a transversal issue from the beginning of the EFA agenda, and it is remarked in all the documents reviewed. I come back to this topic in the sub-section 4 related to development discourses in education. At this point, my attention is on the recognition of the educational (and wider) gaps and inequalities in the globalized scenario, as a main challenge for the educational agenda of improvement.

3.1.2 Education in the Global Economy

The document EFA- Dakar (UNESCO, 2000) highlights the relevance of basic education for access to better opportunities in the “knowledge-based global economy” (UNESCO, 2000, p. 14). Complementarily, in the UN MDG Road Map Towards Implementation of the Millennium Declaration (UN, 2001), it is acknowledged that many countries are behind in terms of ICTs’ connectivity and access, and this situation is negatively affecting the incorporation of the marginalized in the global knowledge-based

economy (UN, 2001, p. 31). The challenges are not only related to basic education but also to higher levels of education, because the needs of the global economy are perpetually increasing. In this sense, UNESCO (2000) also promotes the completion of secondary education for some portion of the work force in order to respond to the expectations of becoming a “modern and open economy” (p. 16). Furthermore UNESCO states that governments are preoccupied with the skills that their graduates have in order to support the economic growth of the countries in the global scenario (UNESCO, 2004, UNESCO, 2005). This can be interpreted in Spring’s view, as the understanding of schooling in terms of a ‘credential society’ - as crucial for providing entrance to the global economy (Spring, 2009).

The agenda of UNESCO assumes a direct relationship between education and economic development (and thus education as an indirect means for reducing poverty) in all the documents. The link is established both at the personal and collective level, and considers education as a needed investment for individuals and societies, with consequent economic rates of return for both (UNESCO, UNICEF, State of Qatar and Save the Children, 2010, p. 11). Therefore, from the EFA agenda defined in Jomtien (UNESCO, 1990), education is associated to social benefits and improvements in areas such as employment and productivity, and also has an impact on international relations and trade (UNESCO, 1990; UNESCO, 2004) The relationship between the human capital of a country and its economic growth, and specifically how students’ scores of mathematics and science can work as “indicator of the future productivity of a country’s labour force” (UNESCO, 2004, p. 9) is also noted. These ideas that UNESCO harbors reflect the relationship established by several authors (Apple, Kenway and Singh, 2005; Arshad-

Ayaz 2008; Dale 1999; Olssen, Codd, O'Neill 2004; Peters, 2006, 2007; Spring, 2009; Stromquist and Monkman, 2000; Stromquist, 2002) between education and economic development in the context of the so-called knowledge economy and specifically about the role of education in the formation of human capital for the needs of the capitalist society (Peters, 2006, 2007).

Although the theme of national or international tests is tackled below in relation to the definition of educational quality (EQL), at this point I will mention that UNESCO recognizes that those scores are used to estimate the relationship between education, economic growth and personal income (UNESCO, 2004; UNESCO, 2005), in part because there is no consideration about how other factors, such as leadership or other characteristics affect the labour market success (UNESCO, 2004, p. 9). The relationship between education and economic development is once again stated in the EFA GMR – Literacy (UNESCO, 2005): "...globalization and the growth of the knowledge economy are creating demand for new literacy skills... (p. 26). Concretely, Education in MDG (UNESCO, UNICEF, State of Qatar and Save the Children, 2010) provides evidence about the relationship between education and increasing individual incomes and economic growth, affirming that "an additional year of schooling can increase a person's earnings by 10% and average annual GDP by 0.37% (Hanushek et al., 2008)" (UNESCO, UNICEF, State of Qatar and Save the Children, 2010, p. 11). Thus, education is seen as vocational training (UN, 2001), as the necessity for improving basic skills of youth and adult populations in order to respond to the challenges posed by the economic sector, employment and productivity in the labour market. It is interesting, considering that Hayhoe and Mundy (2008) situate this relationship between education and 'economic

individual or social returns' within the positivist human capital framework that has been from the 1960s.

As presented, there is an explicit use of the language of the (global) economy, where educational improvement can be understood as means for achieving economic aims, an idea that has been developing for decades. Particularly, these discourses treat education as a sub-sector of the economy, as a realm that offers possibilities for developing the economies within the national but also the international context. This is the understanding of Fairclough (2002) in relation to the 'colonization' of the educational sector by economic motivations and interests, and what other authors (Apple, 2000; Apple, Kenway and Singh, 2005; Arshad-Ayaz 2008; Dale 1999; Dale and Robertson, 2007; Peters, 2006, 2007; Spring, 2009; Stromquist and Monkman, 2000; Stromquist, 2002) acknowledge as the permeation of discourses of the knowledge economy and how education plays an instrumental role for those interests of the global economy.

Nevertheless, it is necessary to acknowledge that education is understood in a broader sense by UNESCO; it is remarked constantly that education is not restricted to the economic aim but to other individual and social goals. This wider sense is presented in the recent document Education in MDG (UNESCO, UNICEF, State of Qatar and Save the Children, 2010), where the idea that the acquisition of knowledge and skills produces economic but also social benefits is reinforced; that education "increases individual and collective empowerment" (p. 11). Moreover, education is considered in relation to the improvement of the quality of life (UNESCO, UNICEF, State of Qatar and Save the Children, 2010).

Certainly, UNESCO is not the only agency producing or reproducing economic discourses within the economic sphere; there are many other IOs (WB, OECD) and mechanisms like international assistance and/or economic aid conditioned to specific policy reforms influencing the decisions that national educational systems make, as I present in following sections.

3.1.3 UNESCO's understanding of education in a wider sense

Indeed, reviewing the documents there is a broad understanding of education beyond the purely economic dimension. From the establishment of EFA Jomtien - 1990, education has also been related to improvements in areas such as health and environment and as “simultaneously contributing to social, economic and cultural progress, tolerance, and international cooperation” (UNESCO, 1990, p. 6).

Fundamentally, education is considered as a right for everybody (children, youth and adults) according to UNESCO's principles. Also, the right to education is directly related to the definition of minimums that must be reached by the countries. The bottom line for UNESCO is approached through the introduction of the notion of “Basic learning needs”, presented from EFA Jomtien – 1990, that seeks to understand how education must consider essential tools and content for promoting a holistic development of individuals:

...essential learning tools (such as literacy, oral expression, numeracy, and problem solving) and the basic learning content (such as knowledge, skills, values, and attitudes)... [are needed] to survive, to develop their full capacities, to live and work in dignity, to participate fully in development, to improve the quality of their lives, to make informed decisions, and to continue learning (UNESCO, 1990, p. 7).

Also, in EFA Jomtien (UNESCO, 1990) it is noted that the importance of the values and attitudes as main dimension for understanding education is related to the role conferred to individuals in the care of cultural heritage and the promotion of universal causes such as social justice and solidarity, the environmental care, promotion of tolerance, and fundamentally, the protection of human rights (p. 10). As UNESCO states, education empowers individuals not only for their own sake but also for reaching collective benefits. Indeed, within this expanded vision of education, from the beginning UNESCO (1990) has associated the goals of educational improvement in the world with the promotion of international solidarity among countries.

The broader understanding of education, beyond the economic interests, is continued in different documents, starting from the Dakar Framework, where the Jomtien definition of education as an expanded notion where the idea that “[individuals] can improve their lives and transform their societies” (UNESCO, 2000, p. 8) is reaffirmed. As I present below in relation to the notion of Educational Quality (EQL) this acknowledges the importance of considering approaches from the critical perspectives that promote the emancipating or transformative aims of education.

Similarly, in EFA GMR Quality (UNESCO, 2004), education and particularly schooling is considered as something “necessary for them [children] to lead productive lives and become responsible citizens” (p. 5). The relationship between education and democracy, where the former supports the formation of citizens is reinforced again in EFA GMR - Overcoming Inequality (UNESCO, 2008). Education allows people to participate adequately in society and its management with minimum knowledge, skills and values (UNESCO, 2008, p. 10). And in the current globalized context, UNESCO

proposes education in global values (UNESCO, 2004): “While basic skills retain a prominent place, global values associated with citizenship and democracy, as well as human rights education, have come more to the fore.” (p. 25).

Although education might be considered a panacea for the problems of the world (as it is frequently stated in different documents) UNESCO (1990) recognizes that it is not a “sufficient condition for personal and social improvement” (p. 6). However, there are many statements by UNESCO where education is presented as a crucial dimension for the solution of many social, health and environmental problems, and explicitly as supporting the achievement of other MDG: “Issues such as protecting the environment, achieving a balance between population and resources, slowing the spread of AIDS, and preventing drug abuse are everyone's issues” (UNESCO, 1990, p. 23). The MDG Report of 2010 states,

“Lack of education is another major obstacle to accessing tools that could improve people’s lives. For instance, poverty and unequal access to schooling perpetuate high adolescent birth rates, jeopardizing the health of girls and diminishing their opportunities for social and economic advancement.

Contraceptive use is four times higher among women with a secondary education than among those with no education. For women in the poorest households and among those with no education, negligible progress was seen over the last decade. (UN, 2010, p. 4).

To what extent can education respond to these expectations? Although not too difficult to put these outcomes as goals, in terms of discourses, it seems really difficult to translate them into concrete actions that produce the expected changes. Furthermore, how

do we measure the impact of education in the solution of other problems affected by many other factors?

The question about the aims of education leads also to the question about what UNESCO and the countries consider as education of good quality and how it can be promoted and attained. This is one of the main emphases presented in the EFA documents discussed below.

3.1.4 Improving Educational Quality (EQL): Much More than Access is Needed

From the establishment of EFA in 1990, the notion of quality (improvement) has been considered in the development of the educational systems, although it is from the definition of the Dakar Framework and further documents where the notion of EQL has been further elaborated.

The Dakar Framework affirms that quality is ‘at the heart of education’. Goal 2 commits nations to providing primary education ‘of good quality’. Goal 6 includes commitments to improving ‘all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills’.

(UNESCO, 2004, p. 5).

Nevertheless, UNESCO (2004) recognizes that “the focus on access often overshadows attention to quality” (p. 4). This transit from EFA Jomtien 1990 to Dakar 2000 is well explained by Nassem and Arshad-Ayaz (2007), who recognize that only from Dakar 2000 the quality dimension was considered as important as access.

3.1.4.1 Finishing School is Not Guarantee of Receiving Good EQL

In this sense, acknowledging the challenges that many countries face in order to incorporate their inhabitants into the educational system, UNESCO states that even those who are attending and finishing school are not receiving the *basic learning needs*. It is in relation to those needs where the elaboration of the notion of EQL and its relationship to literacy starts: "...as this report highlights, too many pupils are leaving school without mastering a minimum set of cognitive and non-cognitive skills" (UNESCO, 2004, p. 4), or "Too many children are receiving an education of such poor quality that they leave school without basic literacy and numeracy skills". (UNESCO, 2005, p. 3).

It is relevant to point out that the elaboration of the notions of EQL and literacy or multiple literacies are closely interconnected. While the first can be understood as an umbrella for the notion of literacy, at the same time, literacy itself is presented at the core of the EFA agenda, as stated in the EFA GMR – Literacy: "Literacy is more than a single goal; it is at the centre of the whole EFA endeavour" (UNESCO, 2005, p. 26).

3.1.4.2 Literacy and multiple literacies as dimensions of EQL

The intersection of these notions and its particular relevance is given by their attention to the outcomes of the students' learning (although EQL considers many other dimensions as well, as presented below). Therefore, in both cases –EQL and literacy- the accomplishment of international or national assessments play a crucial role for measuring the quality of an educational system.

Returning to the definition of EQL, in EFA Dakar UNESCO (2000) remarks that it is important that every country identifies its own "meaning, purpose and content of basic

education” (UNESCO, 2000, p. 13) in order to assess the learning outcomes according to those definitions.

A starting point for elaborating the notion of quality in education is presented in the EFA GMR, The Quality Imperative (UNESCO, 2004). In this report, two principles are presented in order to define EQL:

...the first [principle] identifies learners’ cognitive development as the major explicit objective of all education systems. Accordingly, the success with which systems achieve this is one indicator of their quality. The second emphasizes education’s role in promoting values and attitudes of responsible citizenship and in nurturing creative and emotional development. The achievement of these objectives is more difficult to assess and compare across countries. (UNESCO, 2004, p. 2).

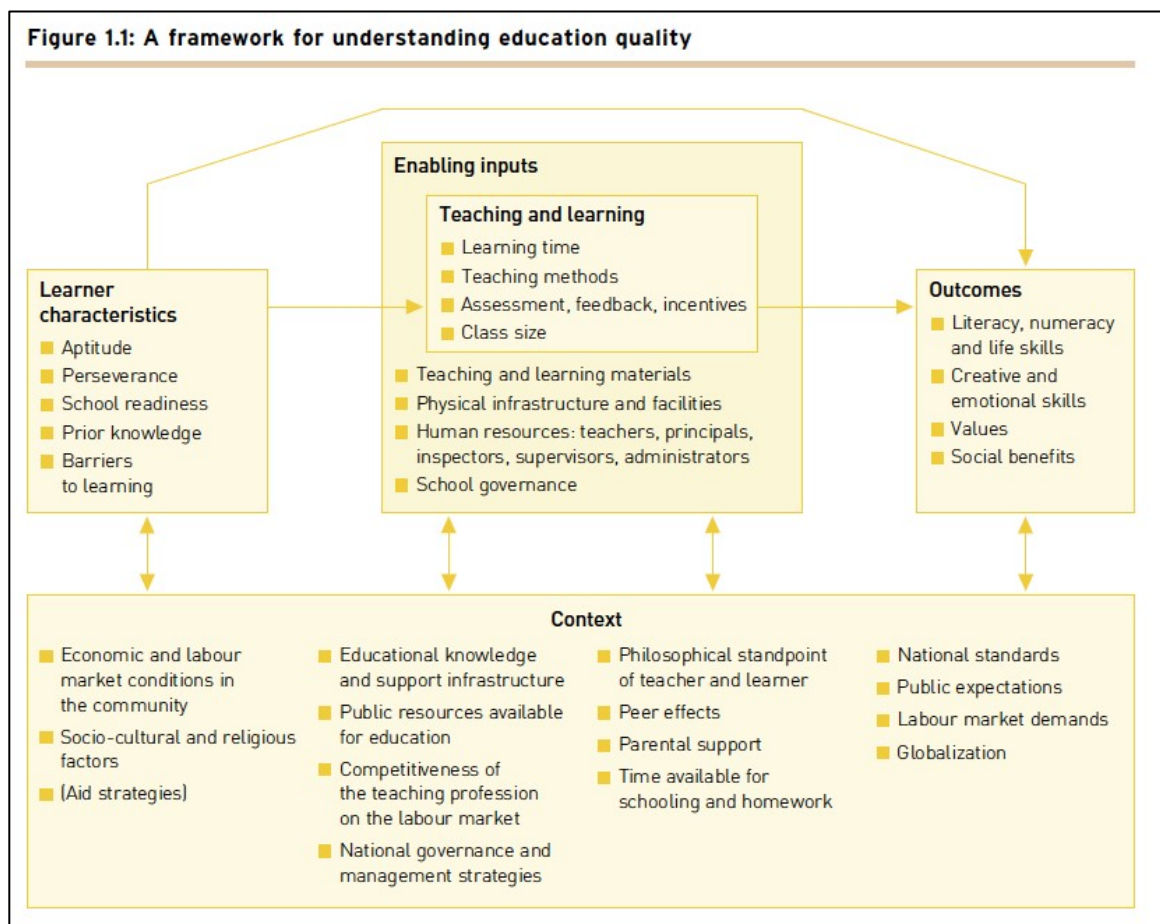
To some extent, the two principles refer to the achievements that education promotes at the individual and social or collective levels. Thus, with a focus on the individuals and social and economic development, UNESCO (2004) states that there are numerous cognitive skills that learners should master (p. 15) but this is, as mentioned before, something far from being a reality around the world.

The idea of improving cognitive skills is directly related to the idea that there is currently a ‘sophistication of knowledge work and the demand for knowledge workers’ (Shapiro, 2002). And following Anderson-Levitt postulates (as cited in Spring, 2009), standardization of the curriculum and subsequent standardized assessments are considered crucial to ensure the adequate performance of students and teachers.

3.1.4.3 EQL Dimensions According to UNESCO: Context, Inputs, Teaching and Learning and Outcomes

Complementarily, UNESCO presents the following framework to understand EQL, identifying several dimensions, elements and factors related to the achievement of relevant skills:

Figure 3.1. A framework for understanding education quality (UNESCO, 2004, p.7.)



As mentioned before, according to UNESCO, the preoccupation of EQL is basically a concern over how much students are learning (UNESCO, 2004), and to respond to this question, countries are increasingly participating in international and national

assessments, as a form of measuring EQL. According to UNESCO (2004), “international testing has been conducted since the 1950s” (p. 9) and IOs (such as IEA and OECD) have actively participated in developing these studies. This current trend that focuses on learning achievement is related to the Baker and LeTendre’s idea (2005) that nations are competing in the international arena in order to be the top performers and to be differentiated as the “best” ranked. Moreover, this emphasis is what has led to Martens (2007) to affirm the existence of ‘governance by comparison’, actively promoted by OECD.

Interestingly, UNESCO (2004) recognizes that one important lesson gleaned from these assessments is the fact that students’ achievements are closely related to their socioeconomic status (p. 10). This acknowledgment is relevant in considering that UNESCO states “quality must also be judged in the mirror of Equity” (p. 35).

3.1.4.4 Main Challenges for Measuring EQL

UNESCO acknowledges that there are some difficulties associated to the measurement of EQL. On the one hand, countries participate in assessments (national or international) that are strongly correlated to the socioeconomic factor, which to an important extent could limit the possibilities for reducing the educational gaps. On the other hand, UNESCO elaborated an index for measuring EQL in the context of EFA: the EFA Development Index (EDI), presented in the EFA GMR in 2003 (UNESCO, 2004, p. 22). This index considers indicators for four EFA goals: universal primary education; adult literacy; gender parity; and education quality (p.22). In the case of EQL, UNESCO has considered the “survival rate to grade 5” (p. 22).

However, it is necessary to interrogate to which extent this indicator can be an adequate proxy of EQL, considering what was previously mentioned: the recognition of UNESCO that students can finish school and still not achieve the minimum skills and knowledge. Also, it seems that with this indicator the concern is still in terms of access and enrollment, as well as about avoiding drop out. This problem for measuring quality is stated by UNESCO itself: "...many international instruments are silent about the qualitative dimension of learning... most indicators available to assess quality are quantitative" (2004, p. 5).

Thus, it is necessary to have in mind the difficulties for measuring EQL, taking into account that the approaches are normally quantitative, for instance when UNESCO (2004) affirms that the "number of students per teacher is a frequently used quality signal" (p.18) or when the net enrollment ratio (NER) is understood as "close to being an indicator of school quality" (p. 16).

When it refers to the outcomes' dimension –or the output of the schooling or educational system- the relationship between EQL and literacy is closer. In the following section, I present how literacy is understood and approached in the UNESCO discourses.

3.1.5 Literacy: Functional Versus Transformative Approach

Discourses of EFA make recurrent references to the notion of literacy and the necessity for its improvement. From the establishment of EFA, literacy is considered as a crucial skill, foundation of other life skills (UNESCO, 1990). Moreover, UNESCO

considers literacy as a right²⁰ that is at the core of the EFA challenges (UNESCO, 2000; UNESCO, 2005).

“All adults have a right to basic education, beginning with literacy, which allows them to engage actively in, and to transform, the world in which they live. There are still some 880 million people who cannot read or write in the world” (UNESCO, 2000, p. 16).

Nevertheless, it is important to mention that literacy has been defined from different approaches and emphases, with personal and social benefits. The notion of literacy can be approached in a broad sense but also it can be restricted to specific characteristics. So, considering its most basic understanding, UNESCO refers to their previous promotion in the 1960s of the notion of “functional literacy”, which emphasized the relationship with “productivity and overall socio-economic development” (UNESCO, 2004, p. 14; UNESCO, 2005, p. 14). In this case, literacy is related to the persons’ ability to “read and write a short simple statement on his [or her] everyday life” (UNESCO, 2005, p. 15), and according to UNESCO this is the most common definition used by countries to present their literacy rates.

It is significant to acknowledge that the literate / illiterate dichotomy has been interrogated by UNESCO. In this sense, in EFA Dakar (UNESCO, 2000) a vision of literacy as a “continuum of skills rather than a simple dichotomy” (UNESCO, 2005, p. 14) is promoted. This allows understanding literacy not only as something that individuals have but also that communities and societies can develop. Moreover, in EFA GMR 2006 (UNESCO, 2005), literacy –in its individual and social dimensions- is viewed

²⁰ I do not analyze adult education or the adult literacy’s challenges as separated of youth literacy. Although different approaches and policies are adopted in this regard, for the purposes of this research the analysis is focused on the general notion of literacy proposed by UNESCO.

as crucial in the context of the “knowledge societies”. As the case of the expanded vision of education, UNESCO promotes literacy improvement as an important factor to improve critical thinking and to approach other social problems such as poverty or disease (UNESCO, 2005). Regarding this, UNESCO understands literacy and numeracy as a “critical tool for the mastery of other subjects” (UNESCO, 2004, p. 3).

Indeed, presenting an estimation of 776 million adults as illiterate, UNESCO notes the importance of acquiring the reading and writing skills as “a key to lifelong learning” (UNESCO, 2008, p. 17), but also to develop other skills as “critical thinking or positive citizen values” (UNESCO, 2005, p. 3). According to UNESCO, improving literacy will produce positive individual and social impacts, from the possibility of individuals remaining on the learning pathway and their emotional and cognitive development, improving the peoples’ quality of life, and/or increasing their participation in society (UNESCO, 2005).

UNESCO (2005) understands literacy in its multidimensionality, and in this regard it can be interpreted as a “metaphor for many kinds of skills” (p. 14). The notion that represents this understanding is the concept of “multiple literacies” (p. 14), which goes beyond the reading and writing skills, not only acknowledging the necessity of learning new languages but considering the development of skills “related to technological, health, information, media, visual, scientific and other contexts” (p. 14).

It is interesting that UNESCO relates this expansion of the notion of literacy “to accommodate the challenges of globalization, including the impact of new technology and information media and the emergence of knowledge economies” (UNESCO, 2005, p. 15). Thus, there is an explicit promotion of a broader understanding of literacy that is

responding to the increasing relevance of the knowledge economy (KE) and its requirements (UNESCO, 2005).

At the same time, UNESCO highlights the critical perspective that opens transformative possibilities to individuals and societies through literacy. Indeed, UNESCO presents the concepts of “empowerment,” “social awareness,” “critical reflection” and “social change,” among the most relevant (UNESCO, 2005, p.15). This is similar to the benefits that education can bring from the postulates of the critical pedagogy, according to UNESCO: “Critical pedagogy argues that, for true learning to happen, the voices of marginalized groups must be heard and fully engaged in the learning process” (UNESCO, 2005, p. 28).

Those statements can be complemented with the notion of critical literacy as a possibility for producing ‘emancipator opportunities’ (Darder, Baltodano and Torres, 2009), and the acknowledgment of the power relations that are embedded in the process of reading and writing (Shor, 2009).

Within this tradition, UNESCO acknowledges the role “Freire’s theory of ‘conscientization’ has played in developing countries and its definitions in education (UNESCO, 2005, p. 15). However, UNESCO makes a note of the difficulty of measuring these benefits –i.e. empowerment or critical reflection- (UNESCO, 2005, p. 16).

However, to some extent it seems contradictory that, on the one hand UNESCO acknowledges the complexity of literacy, and on the other, UNESCO mainly uses the literate / illiterate dichotomy in its documents. So, to what extent does UNESCO promote the functional or transformational approach of literacy?

The UNESCO focus on the marginalized is examined below, in the sub-section related to development discourses, but there is an important emphasis in all the documents of UNESCO exposing the main challenges of literacy mainly in quantitative terms. According to UNESCO, the common factor of illiterates –whether they are from the low income or richest countries- would be in the social and economic inequalities between and within the countries, based on “race, gender, language, disability, ethnic origin, or political convictions” (UNESCO, 1990, p. 17).

Finally, UNESCO points to a main challenge in relation to the issue of literacy’s measurement by countries. On the one hand, UNESCO (2005) states that countries are still using the basic approach of reading, writing and numeracy. This represents an actual problem, for instance, considering the case of Chile. In this case, literacy rate is presented as very high. But Chile presents the proportion of people with at least two years or more of schooling as literate, a claim that has to be interrogated critically, to say the least. According to the notion of multiple literacies, and the idea of overcoming the literate / illiterate dichotomy, it seems that new forms of measurement have to be used and much more than a self declaration using a proxy of the literacy rate (UNESCO, 2005, p. 18) by the countries is needed. As the 2006 GMR puts it: “Alternative measurement methods seek to give a more nuanced and accurate picture. They incorporate direct assessment and the testing of literacy skills on sliding scales rather than dichotomously, and conceive of literacy as a multidimensional phenomenon” (UNESCO, 2005, p. 23).

In this sense, UNESCO’s documents make several references to the information provided by PISA (OECD) –and other tests or surveys-, in order to have a more precise idea of the levels of youth literacy within but also between the countries that take part of

the program (UNESCO, 2004). In the case of PISA, it shows how there are enormous differences and gaps between the countries, which will be retaken in the fourth sub-section about development discourses, where I interrogate critically the kind of literacy promoted.

In the following section, I analyze the discourses of UNESCO related to other International Organizations (IOs) and the kind of networks that have been produced and reproduced through the EFA and MDG agendas.

3.2 The Role of International Organizations (IOs)

In its documents, UNESCO makes references to other main IOs that support the objectives defined in the education sector. In this regard, there is an observable network actively contributing to the fulfillment of such goals around the world. This sub-section contains and analyzes the discourses of EFA and MDG that take as a main scenario the relationship among IOs but also between the countries, in other words, the international arena.

3.2.1 IOs Networking

The participation of IOs in the achievement of EFA and MDG has been established from EFA Jomtien (1990), where UNESCO, United Nations Children's Fund (UNICEF), United Nations Development Programme (UNDP) and the World Bank (WB) are presented as the "core sponsors" for the achievement of EFA (UNESCO, 1990, p. 32). Moreover, in order to illustrate the complexity of the network established, according to UNESCO there are other IOs supporting in different forms the work from the inside and outside of the network: the International Institute of Educational Planning (IIEP); International Bureau of Education (IBE); UNESCO Institute of Statistics (UIS);

International Development Research Centre (IDRC); Commonwealth of Learning; Asian Cultural Center for UNESCO; the International Council for Adult Education; the International Association for the Evaluation of Educational Achievement (IEA) (UNESCO, 1990, p. 29). This situation coincides with the idea of IOs networking in order to shape or define educational systems, which has largely established by different authors (Barnett & Finnemore, 2004; Dale, 2005; Resnik, 2006; Leuze, K., K. Martens, & Rusconi, A., 2007).

Additionally, from 1990 the idea that EFA challenges had to be supported in a collaborative form was installed, considering the work of the International Non Governmental Organizations (INGOs)²¹ as autonomous bodies could play relevant roles in the processes of “monitoring, research, training and material production” (UNESCO, 1990, p. 20).

UNESCO recurrently uses the notion of *Public Private Partnership* in relation to the international level but also to the national level, where the policy decision-making is lead by governments, and other institutions and actors are called to participate. Indeed, as stated in EFA GMR - Overcoming Inequality (UNESCO, 2008): “... achieving EFA requires partnerships at many levels – between schools and parents, between civil society organization and government actors, and between state and non-state education providers” (p. 41).

Specifically at the international level, UN in 2001, following the Millennium Declaration, promoted the interchange of information about ‘best practices’ and it considered the interconnection of many IOs, some with explicit economic aims, as the

²¹ Despite the evident relevance of these kinds of IOs influencing education (Spring, 2009), they are not considered in this research.

World Trade Organization and the Bretton Wood institutions, as organizations highly related to financial and development issues:

The report... suggests paths to follow and shares information on “best practices”.

It draws on the work of Governments, the entire United Nations system, including the Bretton Woods institutions and the World Trade Organization, intergovernmental organizations, international organizations, regional organizations and civil society (UN, 2001, p. 2).

Moreover, in relation to the proposed relief to the poorest countries UN suggests the active involvement of the Paris Club to negotiate the “debt restructurings” (UN, 2001, p. 31). At this point, it is interesting how in this document there is an explicit goal in order to align and coordinate MDG with other goals of economic IOs: “To ensure greater policy coherence and better cooperation between the United Nations, its agencies, the Bretton Woods institutions and the World Trade Organization, as well as other multilateral bodies” (UN, 2001, p. 51).

It is also remarkable that in order to reach the expected coherence the UN consulted IOs such as IMF, OECD, and WB (UN, 2001, p.55). To some extent, what is defined as development goals is harmonized with their different interests and organizational missions. In fact, according to Spring (2009), the policymakers and scholars of these are actively promoting certain educational discourses. Also, taking the postulates of the Actor Network Theory, Resnik (2006) affirms the existence of a global convergence of educational discourses based on economic goals, and UNESCO, OECD, and among others are within this network.

As part of the international agenda some mechanisms of international aid were established, considering the active interconnection between the countries improving their educational systems and/or supporting the improvement of the disadvantaged others. Within this economic framework, some IOs play crucial roles. Indeed, in EFA Dakar UNESCO (2000) acknowledges the role of international aid and the necessity of more financial support to the adequate accomplishment of EFA. This support to education can take the form of development assistance and debt relief offered by multilateral (as the WB) or bilateral donors (UNESCO, 2000, p. 10). This is key to the definition of EFA because it makes explicit references to the financial commitment of the international and national agencies for development (in addition to other kinds of support).

3.2.2 The Role of the World Bank and OECD in EFA

According to UNESCO, the World Bank plays an influential role in supporting the development of education (UNESCO, 2000; UNESCO, 2004; UNESCO, 2005; UNESCO, 2008). On the one hand, it is recognized as the most important donor to education: “US\$543 million per year from 1999 to 2003, equivalent to more than 40% of total multilateral commitments” (UNESCO, 2005, p. 33). Several authors recognize also the central role of the WB in promoting educational development (Baker and LeTendre, 2005; Spring, 2008, 2009; Leuze, Martens and Rusconi, 2007). However, as Baker and LeTendre (2005) affirm, in this case education is under the overall rubric of economic growth and relevant for reducing poverty and inequality.

On the other hand, UNESCO also states the role of the WB in shaping educational systems. Specifically, in the EFA GMR - Overcoming Inequality (UNESCO, 2008) it is mentioned the WB has a “growing interest in a deepening governance agenda” (p. 37).

Furthermore, the WB support to the poorest countries (together with the IMF), for instance, in relation to debt relief - is highly associated with the requirements that those IOs promote in the countries' specific policy reforms:

In September 1996, the Interim and Development Committees of the International Monetary Fund (IMF) and the World Bank endorsed the Heavily Indebted Poor Countries (HIPC) Initiative to provide relief to eligible countries once they meet a range of conditions that should enable them to service the residual debt through export earnings, aid, and capital inflows. The HIPC Initiative requires debtor countries to pursue macroeconomic adjustment and structural and social policy reforms and provide for additional finance for social sector programmes, primarily basic health and education. (UN, 2001, p. 28).

As presented below, the WB has a tremendous influence in defining and shaping the educational agenda. In my view, it is important to counterbalance the policies and discourses of this IO in order to reach an adequate balance between economic and socio-cultural aims.

Allow me to come to the OECD. In the case of the Organization for Economic Development and Cooperation (OECD), the UNESCO's documents remark its promotion of international comparisons through PISA and other surveys, and the factors influencing students' achievement (UNESCO, 2004; UNESCO, 2005). In this sense, according to UNESCO, the PISA is playing a key role for promoting the improvement of EQL and literacy skills around the world (UNESCO, 2004). Moreover, it represents also a dissemination of the "good practice" associated to the participation of the countries in international standardized tests. In the case of the participating countries, through

comparison it provides the possibility for contrasting the educational reality of developing and developed countries: “The contrast between developing and developed countries is striking. The PISA 2006 results on science achievement showed 60% of students in Brazil, Indonesia and Tunisia scoring the lowest possible ranking, compared with less than 10% in Canada and Finland” (UNESCO, 2008, p. 21).

To some extent, as mentioned before, PISA represents a more accurate measure of what students are learning. However, countries assume this kind of assessment as indicators of the quality of their educational systems, and thus their actions become oriented to ensure better results and improve performance rankings. Again, in my opinion, the high presence of OECD shaping educational goals (in this case through the promotion of standardized tests) needs to be counterbalanced in order to prioritize social objectives over economic aims. However, what it is remarkable about this IO is its emphasis in the objective of social cohesion (Spring, 2009), which allows for thinking beyond pure economic benefits.

3.2.3 UNESCO as an International Organization

The reviewed UNESCO documents present several references to the self-development that is needed for UNESCO -and UN more generally- as International Organization. The first statement is in relation to the reaffirmation of UNESCO in its coordinating role of EFA (UNESCO, 2000), with the explicit aim of informing and influencing policy (UNESCO, 2008, p. 30).

Through the UN Millennium Declaration (UN, 2000) there is a reaffirmation of the UN aims “of a more peaceful, prosperous and just world” (p. 1) or its “collective responsibility to uphold the principles of human dignity, equality and equity at the global

level” (p. 1). So, UN recognizes itself as “the indispensable common house of the entire human family, through which we will seek to realize our universal aspirations for peace, cooperation and development” (p. 9). The UN aims are oriented towards the promotion of fundamental values: freedom, equality, solidarity, tolerance, respect for nature and shared responsibility (UN, 2000, p. 2).

This ‘internal objective’ explicitly made by UNESCO can be associated to the postulates of Barnett and Finnemore (2004) about the autonomy and power that IOs exercise. It is interesting how the UN fosters its own development for the fulfillment and achievement of the established principles and goals. Indeed, as stated by Riddell (2007) UNESCO plays a central role as a forum for policy dialogue with focus on EQL improvement, and in order to lead the international educational agenda, it might be necessary for UNESCO to become more empowered in relation to other powerful IOs, such as the WB and OECD. In other words, it is important that the UN strengthen its position in the international arena. To some extent, gaining spaces of power in this context may result in better options for transforming discourses in more effective actions oriented to the achievement of UN principles and values.

As Spring (2009) notes, the nature of the IOs is diverse, and the amount of power they have not only in terms of resources but also shaping the national education systems (see the differences of WB, OECD and UNESCO in their goals and kind of instruction promoted in the precedent theoretical chapter) is not irrelevant.

As mentioned before, some authors (Barnett and Finnemore, 2004; Dale, 2005; Martens, 2007) recognize the central role that IOs are currently playing in defining the national education systems. Nevertheless, despite the consensus about the relevance of

these IOs at the international level, UNESCO also gives a crucial role to what can be changed at the national level. In other words, according to UNESCO, much of the responsibility of EFA and MDG is played within the countries and with the decisions and work made at that level. This is the topic of the following section, with special focus on the process of national policy-making and the main dimensions related to it, from the financial support for implementing educational reforms to the kind of participation and accountability proposed.

3.3 Policy-making in Education

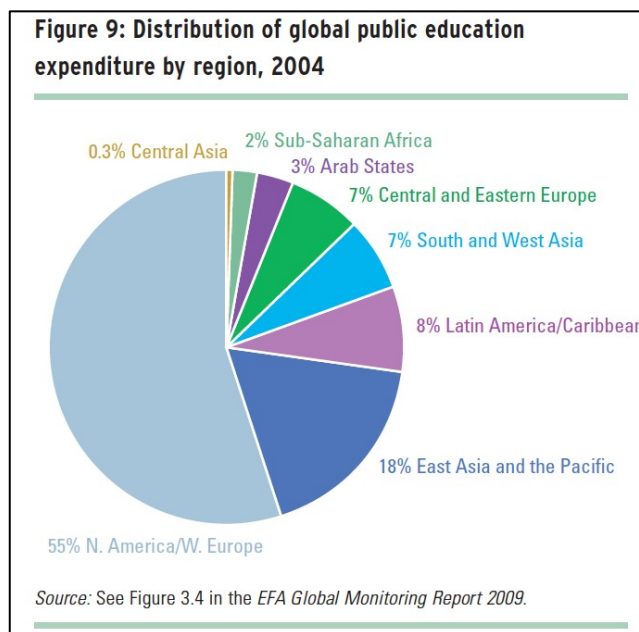
3.3.1 Allocation of Resources: Prioritizing Education

As one the most important factors affecting the national educational improvement, UNESCO constantly refers to the evolution of the national spending on education as a good indicator about the priority that countries give to education and the kind of commitments to EQL that governments have in relation to the development of this sector (UNESCO, 2004, p. 19). In this sense, spending in education is understood from the beginning in EFA as an “investment in people and in the future” (UNESCO, 1990, p. 30) and with this in mind, it is suggested that countries could even consider the “transfer from military to educational expenditure (UNESCO, 1990, p. 12). Specifically, within the national budget UNESCO mentions the idea that “at least 6% of GNP [should be invested] in education, although this is not in itself a guarantee of quality” (UNESCO, 2004, p. 23). In fact, UNESCO affirms that since Dakar 2000 the government spending increased “in the majority of countries with data” (UNESCO, 2008, p. 6). At the national level, UNESCO states that those resources allocated to education have to be equally distributed within the countries, in order to avoid possible inequalities as a result of

implementing policies of decentralization (UNESCO, 2008, p. 26). Specifically, UNESCO also promotes an allocation of resources that allows a significant improvement in the teachers' work conditions, their salaries and other financial incentives to improve their practices and thus the learning outcome of the students (UNESCO, 2008, p. 29). Moreover, EFA Jomtien (UNESCO, 1990) presents that in some industrialized countries in the 1980s cutbacks occurred in government expenditure that "have led to the deterioration of education" (p. 5).

The situation in the developing countries is different from the developed world, and they face other challenges in terms of the allocation of resources. Thus, it is also necessary to consider that the low-income countries need extra financial support from international donors in the form of development assistance or debt relief (UNESCO, 2000). Indeed, the following graph shows the unequal distribution of the educational expenditure in different regions of the world (UNESCO, 2008, p. 26) and reflects why this situation must be intervened:

Figure 3.2. Distribution of global public education expenditure by region, 2004 (UNESCO, 2008, p. 26).



The relationship between the developing and developed countries, and the reproduction of inequalities and educational gaps exposed in the figure above is a main issue that will be analyzed in the sub-section related to development and education. However, it is important to mention here that although considerable differences exist between developed and developing countries in terms of the allocation of resources, countries around the world are facing similar trends in terms of experiencing a major increase in privately financed education: students' loans and credits and the involvement of the private sector itself in the PPP to improving education. While a balance between public and private investment in education must be promoted to fulfill the expectations of nations, it is necessary to consider that an educational system financed fundamentally with public resources (as is the case for the majority of the countries in the developed world) is not the same as those systems highly sustained by private investment. Certainly, this main difference affects the objectives and the outcomes of the educational processes.

3.3.2 Government Responsibilities

While the UNESCO discourse sees governments as ultimately responsible for coordinating and leading educational policies, it also stipulates that governments must involve other partners for reaching the expected national educational improvement. In turn, the involvement of the private sector opens possibilities for the for-profit sector and its economic interests to take higher control over the educational sphere, in the process of designing and implementing educational policies.

Thus, UNESCO actively assumes the role of informing and shaping national policies, as mentioned above. In this sense, many documents make explicit recommendations to the countries in order to organize the work that governments around the world must undertake to achieve EFA (UNESCO, 2004; UNESCO, 2008).

While the responsibility of improving education is transferred to the national governments, UNESCO asks for specific requirements that countries must understand as minimums of action. This is interesting because whether UNESCO is giving a recommendation or is requiring specific products (for instance, as the action plan that countries had to elaborate to face the EFA challenges) is not clear in these discourses. Indeed, according to Dale (2005) there is a complex interrelation between the supranational, national, sub-national and local, and there is not a complete convergence with the discourses produced in one scale. Similarly, this is what Ball (1998) refers to as a process in which global forces are recontextualized within the countries, and what Fowler (2004) understands as the expressed intentions that governments assume as national policies.

In this way, according to UNESCO, national governments must assume strong leadership and a proactive role in the improvement of the education system's quality, which implies also a marked political will -sustained commitment- oriented towards this goal (UNESCO, 2000, p. 17; UNESCO, 2005, p. 27; UNESCO, 2008).

Moreover, an adequate internal coordination is required among different government units responsible for child education, literacy and health programs, among others (UNESCO, 2004, p. 3). And this effort has to be assumed not only by policy-makers but also it must consider a permanent coordination with other actors and sectors: academics, NGOs and other agencies (UNESCO, 2004). Moreover, as it is promoted in the international arena, at the country level the Public Private Partnership (PPP) is strongly recommended by UNESCO in all its documents from the beginning of EFA (UNESCO, 1990, 2000, 2004, 2005, 2008; UN, 2000):

ARTICLE 7 - STRENGTHENING PARTNERSHIPS: National, regional, and local educational authorities have a unique obligation to provide basic education for all, but they cannot be expected to supply every human, financial or organizational requirement for this task. New and revitalized partnerships at all levels will be necessary. (UNESCO, 1990, p. 11).

As presented above, Public Private Partnership (PPP) can take different forms or put emphasis in different actors, from the international to the local levels, and there is a call for including diverse people ranging from different groups such as religious groups, private organizations, NGOs, teacher unions, professional groups, donors, media, local communities and families (UNESCO, 1990, p. 26). Among them, UNESCO recognizes

the special importance of those actors directly related to the educational improvement: teachers, schools administrators and parents.

The preeminent role of teachers as well as of other educational personnel in providing quality basic education needs to be recognized and developed to optimize their contribution. This must entail measures to respect teachers' trade union rights and professional freedoms, and to improve their working conditions and status. (1990, p. 27).

However, what appears absent is the participation of students in the PPP proposal. On the contrary, students are subjects of the actions and strategies defined for improving education, but there is not an explicit promotion of their involvement.

The idea of PPP is directly related to the processes of participation that have to be opened to society, to support the educational improvement of nations (UNESCO, 1990, 2000, 2004, 2005. 2008; UN, 2000). UNESCO understands participation in its basic but also more complex and advanced form. So, on the one hand, UNESCO promotes forums or “room for consultation” with different actors and institutions of the PPP (UNESCO, 1990; UNESCO, 2004, p. 29). However, the notion of the Public Private Partnership at least can be interrogated in terms of what Peters (2007) calls the promotion of an “entrepreneurial culture” through PPP.

On the other hand, UNESCO (2000) recommends more direct participation of civil society in the processes of design, implementation, monitoring and evaluation concretely of the national plans for EFA (p. 18). Overall, what appears to be an ultimate goal in this regard is the idea of “building a culture of dialogue” for developing a good educational system that respond to the national contexts (UNESCO, 2004, p. 29) and thus reinforcing

democratic initiatives and participation of stakeholders and citizens (UNESCO, 2000, p. 9). In this sense, UNESCO (2000) recognizes the special relevance of the participation at the local levels, and it promotes participation in the decision-making process at all levels: "governments must put in place regular mechanisms for dialogue that will enable citizens and civil society organizations to contribute to the planning, implementation, monitoring and evaluation of basic education" (p. 18). At the same time, the participation of the vulnerable in the planning system, in other words, a necessity "to include the voices of the poor" (UNESCO, 2008, p.31) is remarked.

But, how do they participate? Is it through representation or direct participation? To what extent can it be considered the voices of those who do not have preparation or have received less or even no education? To what extent is participation allowed to "technical" issues that require minimums of knowledge about certain topics?

As it has been presented, UNESCO has promoted different levels of participation, but it seems that there is a transit of an emphasis on consultation from the beginning of the EFA agenda (UNESCO, 1990) towards more active forms of participation and involvement in planning, implementation and monitoring processes since EFA Dakar (UNESCO, 2000). Again, in relation to a culture of dialogue, an invitation to students is absent. Why is this happening? Why are they not considered as valid interlocutors defining the present and future of the educational systems? On the other hand, how can the poor or vulnerable (less educated and marginal) be considered as valid interlocutor in the context of the knowledge economy?

The different mechanisms and strategies promoted by UNESCO in the policy-making process –PPP, participation, and accountability, among others- can be associated with

two broader processes directly related to the policy making process: a) the promotion of educational reforms to continue improving education; and b) the preoccupation for implementing “good” governance practices. In the first case, reforms are seen as possibilities for introducing modifications and improvements within the educational systems. In the second, governance seems to be an umbrella for including and promoting practices and processes such as participation, efficiency, accountability or transparency.

3.3.3 Education Reform as a Continuum

Specifically, UNESCO has affirmed in Dakar 2000 the necessity for reforming²² educational management, passing from centralized “forms of management to more decentralized and participatory decision-making, implementation and monitoring at lower levels of accountability” (UNESCO, 2000, p.19); or remarking the importance of incorporate incentives to have good teachers working in the most difficult places and rural schools (UNESCO, 2004, p. 28): “Teachers, critical to any reforms to improve quality, represent the most significant investment in the public sector budget. How to improve recruitment, training and conditions of service with limited means is a foremost policy issue” (p. 27).

But reforms also affect the kind of education that is imparted in the countries. In this sense, UNESCO proposes educational reforms that –among many other topics– emphasize substantive issues such as adult and continuing education, literacy

²² The forms and content of what is proposed in educational reforms is highly based on the evidence of “good practices” provided by research around the globe. Thus, as discussed in the fourth sub-chapter - development discourses in education- normally these “good” practices are transferred (at least promoted) from the developed to the developing world, and in this way, they reproduce the hierarchies of knowledge based on what is the result of “better” scientific research (or that privileged knowledge stated by Hans Weiler as cited in Spring, 2009). In this sense, is relevant the emphasis that UNESCO put on the imperative of the countries for developing reliable information and data systems in order monitor and evaluate their own progresses and challenges (UNESCO, 1990, p. 24).

improvement and particularly the empowerment of women and gender equality (UNESCO, 2000) as well as the pedagogic approaches used for better learning: “Practitioners broadly agree that teacher-dominated pedagogy, placing students in a passive role is undesirable” (UNESCO, 2004, p. 25). In other words, UNESCO promotes reform not only at the managerial level but also in the definition of what is important to the world education system, presenting some alternative approaches. This is the case when UNESCO presents different approaches to education –from the behaviorist and humanist theories to the postulates of the critical pedagogy, all of them with theoretical and empirical background (UNESCO, 2004, p. 6). This corresponds to how Spring (2009) understands the educational agenda promoted by UNESCO.

Within the discussion about the final aims of education, UNESCO states that the “policy dialogue” opens the discussion on the expected student achievement, and the reasons of the countries for setting those expectations (UNESCO, 2004). Certainly, this dialogue considers the debate about the subjects taught and the time allocated to each of them (p. 26).

At the same time, UNESCO explicitly promotes the participation of countries in “comparative regional and international learning assessments” (UNESCO, 2008, p. 7). From the students’ learning outcomes of a particular country, many reforms are justified in order to implement policies that have been already implemented in the top performers countries.

Nevertheless, UNESCO acknowledges the main problem mentioned by those who are opposing these assessments: they can present “perverse effects” into the learning process, such as the risk of narrowing the curriculum in order to better prepare the students for

specific subjects (UNESCO, 2008, p. 29). Moreover, other times UNESCO warns the countries about certain policies and possible limitations or problems. This is the case with the recognition that “school competition and choice and private-public partnerships have their limits” (UNESCO, 2008, p. 7).

Baker and LeTendre (2005) corroborate the understanding of reforms as a permanent state in education, remarking the constant interconnection between present and past reforms that again will influence those in the future. The idea of educational reforms as a continuum is strongly linked by UNESCO to the promotion of reforms in issues of governance, as presented below.

3.3.4 “Good” Governance Practices

The promotion around the globe of “good” practices of governance have been emphasized by UNESCO and other IOs, such as the WB, interested in “deepening the governance agenda” (UNESCO, 2008, p. 37). Indeed, governance is seen as an opportunity to introduce modifications in the way of planning, implementing, monitoring and evaluating public policies. In this sense, in EFA Dakar 2000 UNESCO stated the idea of developing better systems of educational governance “in terms of efficiency, accountability, transparency and flexibility” (p.19). In EFA GMR 2009, UNESCO (2008) reaffirmed the relevance of this reform for EFA, with emphasis in “accountable and participatory education systems” and it was also promoted that “good governance” had to be understood from the bottom, thus allowing national and local particularities (UNESCO, 2008, p. 25): “Governance concerns the distribution of power in decision-making at all levels of an education system, from ministry down to school and community.” (p. 24).

The involvement of the local level coincides with the postulates of Dale (2005), in terms of recognizing the role that different territories play in educational governance. Also, UNESCO identifies some key areas for the improving of governance, highlighting the importance of the national level for defining the required improvements (UNESCO, 2008): “[A] shift from individual projects to system-wide programs... National ownership... Aligning aid with national priorities and using government systems.” (p. 36).

What it is important for UNESCO is to clarify that the countries receiving the aid can have the opportunity and space to take and adapt what is considered pertinent in their context (UNESCO, 2008, p. 36). Nevertheless, there are some problems associated with the international aid, as it is presented in the fourth sub-section.

In recent years, UNESCO brought the issue of governance again in the EFA Report in 2009, under the assumption that improvements in this area would positively influence the existence of enormous inequalities and gaps between and within the countries and also might impact the quality of education (UNESCO, 2008)²³. So, UNESCO states that it is not only about education governance but a broader approach oriented, for instance, to the development of “policies for reducing poverty” (UNESCO, 2008, p. 7).

Concretely, UNESCO required that the countries elaborate their own “EFA Action Plan”, assuring participation of different national actors, particularly from the civil society (EFA Dakar, 2000) in setting the definition of meaning and goals of basic education (the decision-making process),

...all States will be requested to develop or strengthen existing national plans of action by 2002 at the latest. These plans should be integrated into a wider poverty

²³ To some extent, UNESCO recognizes that the focus on governance issues also makes possible “a greater policy coherence” among IOs for dealing with the global challenges (UN, 2001, p. 51).

reduction and development framework, and should be developed through more transparent and democratic processes, involving stakeholders, especially peoples' representatives, community leaders, parents, learners, non-governmental organizations (NGOs) and civil society. (UNESCO, 2000, p.9).

Recognized as a good practice in governance, UNESCO reinforces an active participation of different sectors in the planning, implementation, monitoring and evaluation of the EFA plan. However, at the same time UNESCO admits that in some cases the “Plans” (sector plans, integrated plans for reducing poverty or others) can be declarations of good intentions responding more the international agenda for education than an actual necessity from the countries: “Evidence of how these plans are being implemented is patchy. Some are clearly broad statements of intent, written in some cases to meet international requirements.” (UNESCO, 2004, p. 32).

This is interesting, because to some extent there is an acknowledgment that the EFA agenda (or others as MDG) can be understood as imposing on some countries from the outside, and in this way translated into national policies for responding to global challenges. How can national actors adopt those impositions from the international level? The question at the end has to do with whether those educational challenges make sense or not: in the first case, educational goals and policies have better chances of being well implemented and with positive outcomes; otherwise, it happens what UNESCO declares as statements of intents, not necessarily shared or understood by the national actors. Furthermore, within the country, it is also possible that some actors positively receive those educational challenges identified from outside, while others –at the national and local levels- resist and reject them, considering them to represent the *dominant interests*

of the world. In this sense, the disputes about how to nationally define the EFA agenda can be sustained both between the national and the international order, but also as a dispute within the country, politically and ideologically based.

In order to support policy development, UNESCO notes as essential the processes of constant monitoring and evaluation of the education systems and the implementation of strategies and action plans for achieving educational improvement (UNESCO, 2008). For this reason, in 1990 the necessity of defining indicators and procedures that could be monitored in terms of the progress and achievement of the EFA targets (UNESCO, 1990, p. 21) were indicated.

As it has presented in this sub-chapter related to the policy making in relation to the adoption of EFA agenda in the countries, there are many dimensions that are directly and indirectly affecting the improvement of the educational systems. Although all of them are relevant to reach that objective, there is one dimension that in my view is crucial for carrying out the numerous tasks and actions proposed. This dimension is related to what UNESCO (1990) refers as the “enhancing national capacities” (p. 31): the human resources and the countries’ challenge for developing and installing the required capacities in those working and leading directly the processes of educational improvement: from policy-makers and public servants working within the system to teachers and administrators at the school level, as well as academics and researchers supporting the process from different sectors. This is what UNESCO refers as “many kind of expertise and skills... managerial and supervisory personnel... planners, school architects, teacher educators, curriculum developers, researchers, analysts” (UNESCO, 1990, p. 24). The challenge established is vast and complex, considering the existing

disparities between and within the countries. To some extent, it states the risk of establishing a path that some countries (the developed) have already installed, reproducing the gap between the two worlds. How may each society advance according to its own pace, following its cultural background? In the end, it is the discussion about the kind of development assumed within the context of international aid (Ghosh, 1976). The question can be presented in the following terms: do the educational systems improve through technical assistance from developed countries or is its improvement (as transformation or emancipation) the result of the ‘imperialistic exploitation’ recognition? Probably the answer about the ways to improve or to develop the system is grounded in the two paths, as it has recognized in the contemporary discussion in comparative education, where the global and the local are recognized as relevant for defining education.

Seeing from outside and with some distance the issue of ‘the development of the other’, it can be easy (or at least not very difficult) to install ‘crucial’ factors and dimensions through processes of training and financial support. Nevertheless, what is less understood is how those categories that have not been present from traditional forms cannot be installed from one day to another as a legal or normative requirement. For instance, it is the case of basic literacy; a skill largely developed and taught in the developed countries, but not necessarily rooted within the developing world, with relatively recent history of mass education systems. Although the installment of these capacities can be understood as a central task for the international community, in reality there have been some problems with the international aid that are presented in the following sub-chapter.

What it is clear is the importance of identifying the different scales in which the challenge for improving education is being played: from the international to the national and the local. Certainly, UNESCO recognizes this complexity and it makes explicit what is the responsibility of the international, national, sub-national or the local levels. Something the current literature reinforces practically as a consensus is acknowledging the role of the territorial levels and actors within those scales – such as the state, market, community, family- (Dale, 2005) or more specifically, teachers, parents, principals and other actors (Fullan, 1998).

3.3.5 The Global – Local Relationship in Educational Policy Making

UNESCO establishes the importance of considering the territorial levels since EFA Jomtien 1990, particularly in relation to the definition of intermediate goals and plans of action at the sub-national and local levels (UNESCO, 1990). UNESCO acknowledges the differentiation between those and the national goals and priorities: “local plans in the same national setting will naturally differ not only in scope but in content” (p. 21). The same is reaffirmed in EFA Dakar (UNESCO, 2000), but UNESCO promotes openly a transition from centralized to decentralized educational management, with the consequent increasing participation of the lower levels, which can also support the scaling up of local participatory or other interesting experiences (UNESCO, 2000, p.16; UNESCO, 2005, p.27). This is consistent with Baker and LeTendre’s statement (2005) about the shift from centralized control to decentralized control that transfers responsibilities and power to the local authorities and citizens.

Moreover, UNESCO states that for the implementation of EFA, it is necessary to have an adequate policy environment at national, sub-national and local levels (UNESCO,

1990, p. 22), which implies the active involvement of local and sub-national authorities and at the same time it can be related to the content of education: “curriculum should be sensitive to local conditions” (p. 23). This corresponds to the balance between top down and bottom up strategies stated by Fullan (1998).

To utilize this strategy –and assuming the complexity of the challenges-, UN promotes a framework oriented to the development of local capacities and to “strengthen local governance” (UN, 2001, p. 40). In relation to the MDG, targets and indicators, UN expects that the information “be calculated for sub-national levels” (UN, 2001, p.55). UNESCO discourses are actively promoting the consideration of the local, whether in terms of the role of local authorities of education, the participation of local communities or the disaggregation of the national information in regard to EFA and MDG. But there is another explicit justification for involving the local, and it has to do with the sense of “community ownership” (UNESCO, 2005, p. 27) in relation to the design and implementation of EFA and MDG initiatives. The global-local relationship is associated with the notions exposed above of PPP, decentralization and participation of multiple actors at different territorial levels. On the one hand, it represents the possibility of including more voices in the definition of the educational improvement (UNESCO, 2008, p.31); on the other, it implies a transference of responsibilities for reaching this improvement, through the establishment of mechanisms that situates more opportunities of decision-making at the bottom of the educational system (p. 25).

Furthermore, UNESCO (2008) recognizes two problems that have predominated the policy making process: “a tendency to apply ‘blueprints’ that do not address local conditions and insufficient attention to equity” (p. 39). In this sense, in the terms of Ball

(1998) for national policymaking more than the blueprint has to be understood as a *bricolage*, consisting in borrowing and copying educational policies from other places of the world but at the same time recontextualizing them (Ball, 1998, p.126).

This is interesting because this recognition comes from UNESCO, a key IO that is highly influential and promotes the implementation of specific agendas in the field of education. To some extent, it seems to be a contradiction between the emphases on the consideration of the local context, while simultaneously these global agenda are imposed to the countries in order to foster their development. In other words, although respecting the local context, it seems that the global discourses reinforce the blueprints for overcoming the developing countries' problems.

Also, the second problem –the lack of attention to equity- reveals the complexity of overcoming global and national disparities and gaps, even when this issue has been in the agenda from the beginning of EFA and it was reaffirmed in the establishment of MDG.

In this way, despite the marked trend that considers the importance of the local contexts to adapt the discourses and priorities promoted from the upper levels (national and international), there are many other discourses –facts and ideas expressed in UNESCO's texts- that tend to produce and reproduce social relationships between and within the countries, as dichotomies of the “the good or best versus the bad or evil” and “the developed versus the developing or underdeveloped”. As presented in the following section, discourses of development and education thus can be critically analyzed as texts that simultaneously open possibilities for social transformation but at the same time are reinforcing the differences –pointing out to the “other”- and the existent inequalities.

3.4 Development and Education

3.4.1 Education for Promoting Development

As it has been presented at the beginning of this chapter, UNESCO declares ideals, principles and values that situate education as a crucial sphere for promoting social and economic development. At the same time, education can be considered in its dual dimension: promoting the global and local development simultaneously. On the one hand, UNESCO highlights the importance of taking into account the local issues and the opportunities that education gives to individuals to actively participate in the definition of their own destiny, through skills and knowledge that allow them to make informed decisions (UNESCO, 1990, p. 7). On the other, UNESCO promotes an education in global values beyond local particularities:

The development of cognitive, creative and social skills is invariably included, but there is also concern for values, both global – respect for human rights, the environment, peace and tolerance – and more locally defined, such as cultural diversity. Many countries are working towards the right mix of universal and local. (UNESCO, 2004, p. 25).

Therefore, promoting a mixed local-global education, UNESCO (2005) recognizes the importance of having a curriculum pertinent to the local contexts, but also that provides broader opportunities to the learners (p.28).

For instance, UNESCO (2005) warns a possible risk of students only learning the local language(s), which could limit possibilities for their further development: “Using only the local language as a learning medium, however, can be a barrier to broader participation in a country’s social, economic and political life.” (p. 30).

Following this approach to the language element, however, leads to the question about the necessity of learning the dominant language: English (also in relation to the promotion of multiple languages acquisition). To some extent, the countries would be able to decide whether or not they want to incorporate English as a second (or third) language. But the pressure of the global knowledge economy, and the competences required to the competitive immersion in the international markets, knowing that English is recognized as the language of the business or managerial sphere, inevitably push for teaching it.

UNESCO acknowledges that any strategy followed by the countries has to be integral, based on “social, cultural, and ethical dimensions of human development” and oriented to the achievement of the outcomes that different national educational systems have defined (UNESCO, 1990, p. 23). But even with this acknowledgment, EFA and MDG discourses seem to promote certain development that has already been reached –at least to a certain extent- by the richest countries. As showed below, sometimes the UNESCO’s discourses appear to be narrated as if they were coming from one side (UNESCO and the developed world showing the “right” trajectory) to help “the other,” “the poor” or “vulnerable”.

3.4.2 Focus on the “other”

UNESCO have oriented the educational agenda from the beginning with emphasis on the disadvantaged peoples around the world, since EFA Jomtien 1990, labeling to them as: “...the poor; street and working children; rural and remote populations; nomads and migrant workers; indigenous peoples; ethnic, racial, and linguistic minorities; refugees; those displaced by war” (UNESCO, 1990, p. 9).

What UNESCO does as a starting point for defining its discourses of EFA and MDG is to avow the social injustices and situations of conflict affecting human coexistence and possibilities for development. This emphasis is not only towards persons but also it means to prioritize to those countries “least able” (UNESCO, 1990, p. 20) to reach the expected improvements in basic education, the “economically poorer countries” (UNESCO, 1990).

To prioritize means that the efforts will be on those peoples and countries. Therefore, is it possible to affirm that EFA is an agenda for the developing world? To what extent are the challenges of the developed countries explicit or silenced? When UNESCO emphasizes a focus on the poorest countries, what happens to those living social injustices within the developed countries?

In the UN Millennium Declaration, others criteria of vulnerability are assumed by UNESCO: age and gender. Consequently, children and women (UN, 2000; UN, 2001) are the vulnerable people that must have the attention of the efforts to improve education. In the same declaration, special consideration is given to Africa, in order to lead the continent towards the “...consolidation of democracy... and assist Africans in their struggle for lasting peace, poverty eradication and sustainable development, thereby bringing Africa into the mainstream of the world economy” (UN, 2000, p. 7).

It is essential that the continent embark on the path to sustainable development and achieve its goals of economic growth, increased employment, reduction of poverty and inequality, diversification of productive activities, enhanced international competitiveness and increased exports. (UN, 2001, p. 45).

In this sense, Africa is understood entirely as “the vulnerable” that must be assisted and supported. And the support is for bringing those democratic values and economic integration that the international community wants for “them”, their active participation in the ‘mainstream world economy’. At this point, it is valid to ask then, what kind of education does Africa need to attain this objective? To what extent do Africans agree with the establishment of this aim? According to UNESCO, this is something that the African leaders have assumed in the Millennium Summit (UN, 2001, p. 43). What UNESCO is reproducing is the notion of a trajectory towards development that richest countries have already reached.

The strategies presented by the UN are numerous, and point out to the poverty eradication and sustainable development in Africa, fundamentally from an economic perspective: “debt cancellation, improved market access, enhanced Official Development Assistance and increased flows of Foreign Direct Investment, as well as transfers of technology” (UN, 2000, p. 8).

Africa can be understood as the *extreme illustration* of what means to be vulnerable and poor to the developed world. It is ‘extreme’ in the sense that to an extent, more or less, this marginality is found in other regions of the world. In this way, UN states: “Some of those problems [poverty, diseases, debt burdens, conflict] are general to developing countries, but Africa suffers particularly from its marginalization in the process of globalization” (UN, 2001, p. 5).

These discourses of UN pointing out Africa do not allow for the awareness of the large stigmatization of Africa by the world leaders, as a place where all the evils were

concentrated and had to be eradicated. How will it be possible to revert this image of Africa? Only when it resembles the developed world?

Specifically in relation to education, on the one hand, the MDG report states the relationship between the lower access and quality of education faced by those living in marginality and poverty (UNESCO, UNICEF, State of Qatar and Save the Children, 2010). The fact that within the countries “large sections of society are being left behind” (UNESCO, UNICEF, State of Qatar and Save the Children, 2010, p. 9) is also recognized in reference to the enormous inequalities, discrimination and educational gaps that many students face in some countries.

Inequalities are present in every society but they are more marked in the developing world (low and middle income countries). So, although the problem is more difficult to solve in these countries, it also has to be faced within the richest societies. However, there is a notable silence in this regard, in the sense that the UNESCO documents do not refer to the challenges and strategies that the developed countries are implementing to face problems of inequality.

3.4.3 Developed Versus Developing World: Educational Inequalities and Gaps

Therefore, the EFA agenda has reaffirmed what UNESCO calls the “pro-poor approach” (UNESCO, 2008, p. 3), and in this EFA GMR UNESCO admits that the inequalities in education are highlighted for the cases of the developing countries (and thus, by omission UNESCO avoids going deep into the inequalities within the developed countries) (p.8).

The relationship established between education and economic return both for individuals and countries –analyzed in the first part of this chapter- generates a solid

argument in order to promote that developing countries follow the postulates and strategies coming from the developed world. In this sense, UNESCO presents numerous information and statistics showing the main inequalities in education between the developed –where many EFA goals have been already achieved- and the developing world (UNESCO, 2004). At the most basic level, there are global disparities in terms of access to education, whether they are in relation to preschool, primary, secondary or tertiary education. In the case of preschool, UNESCO states:

“sub-Saharan Africa can expect only 0.3 years of pre-primary schooling, compared to 1.6 years in Latin America and the Caribbean and 2.3 years in North America and Western Europe.” (2004, p. 1).

“global disparities in provision continue to divide the world’s richest and poorest children. In 2006, pre-primary gross enrollment ratios averaged 79% in developed countries and 36% in developing countries” (2008, p.4).

With respect to the secondary level, UNESCO mentions that, for instance, “OECD countries have almost reached universal secondary education” (UNESCO, 2005, p. 9), while in some countries and regions, the main challenge is UPE. Large differences between countries continue to increase, according to UNESCO in relation to tertiary education: “In rich countries such as Canada and Japan, over half the population aged 25 to 34 has reached tertiary level. In contrast, half the children in poor countries such as Bangladesh and Guatemala will not even complete primary school” (UNESCO, 2008, p. 15).

Complementarily, there are also important differences in terms of expenditure per student. Accordingly, in 2006 there was a variation “from less than US\$300 in much of

sub-Saharan Africa to over US\$5000 in most developed countries” (UNESCO, 2008, p 26). The difference is vast, considering also that UNESCO recognizes the importance of having resources as exposed in the previous chapter to invest in the educational system (from materials, equipment to teacher quality, among others). In this sense, UNESCO (2008) mentions the fact that important amounts of resources are taken for granted, while in some developing countries basic infrastructure is still insufficient (p. 5). Moreover, this difference is not only in relation to basic education but also in tertiary education, where “France spent sixteen times as much per university student as did Peru or Indonesia in 2004” (UNESCO, 2008, p. 17).

Furthermore, the inequalities are certainly beyond access and spending. The educational gap is expressed in terms of the students’ learning outcomes. Regarding this, UNESCO (2004) remarks enormous global disparities between countries. In this way, “in too many [developing] countries, children are not mastering basic skills. Low achievement is widespread” (p. 20). This is in contrast to the reality of the developed countries that perform better than the former in international assessments. Specifically, UNESCO mentions that PISA’s results show the same trend, where students from OECD countries who performed in the lowest level of literacy (18%) were significantly less than the 40% of students performing at the same level in middle and low-income countries (UNESCO, 2004, p. 20). The same program (PISA – 2006) revealed the contrast between countries, where achievement in the lowest level science reached 60% of the students in countries such as Brazil, Indonesia and Tunisia, “compared with less than 10% in Canada and Finland” (UNESCO, 2008, p. 21).

All these global disparities –in access, spending, learning outcomes- can be understood as the result of intended and structural inequalities of the world order and the relationships between the countries and their relative position, following critical postulates from Petras (2008) and Galtung (1972). At the same time, it is important to acknowledge that those inequalities are reproduced within the countries, where the educational opportunities are completely different for the richest families in relation to the rest of the country's population²⁴.

In this sense, UNESCO presents also large amount of information and statistics showing the discrimination mentioned above (UNESCO, 2008). In the global scenario UNESCO states that the “wealthiest 20% of households have already achieved universal primary school attendance in most countries” (p. 4). To some extent, this estimation proves that although the focus of EFA is on developing countries, there is an acknowledgment that within those countries the elites would be receiving similar opportunities to those from developed countries. And although UPE has been achieved in the developed world, these countries still face inequalities, whether in other levels of education (university education) or in relation to the lower access of marginalized groups (indigenous, living in poverty conditions, etc.).

The effort that UNESCO is harbouring to go further than EDI to provide information about national inequalities is also interesting. This is the case of the “EFA Inequality Index for Income Groups (EIIIG)” (UNESCO, 2008, p. 23). Unfortunately, this index has not been applied to a significant number of countries. The same situation occurs with

²⁴ There are, however, anomalies such as Cuba, mentioned in the EFA GMR (UNESCO, 2004, p. 13) with a high performance together with Canada, Finland and Republic of Korea. Despite its low-income levels, Cuba has almost reached universal primary and secondary education and has consistently scored well in international tests (p. 21).

PISA that offers the possibility for identifying learning achievement in relation to the socioeconomic status of the students. But again, this information is reduced to the countries participating in PISA.

The global and national disparities are an issue that has preoccupied UNESCO from the beginning of the EFA and MDG agendas. However, despite the warnings issued by this organization to the international community, there are not clear trends towards the overcoming of this obstacle to achieve EFA and to improve the educational systems within a framework of social justice. On the contrary, some facts –as presented below- show that the commitment and support of the international community to those that most need it has even decreased in some cases.

3.4.4 Resistance: When the Solutions are Interpreted as Impositions from the Powerful World's Countries

The permanency of the global and national disparities in the benefit of the powerful – structural inequalities- has opened alternative approaches to support the educational improvement. Indeed, in 2001 UN avows how richest countries have benefited since some economic policies were carried out:

Eight rounds of multilateral negotiations have done much in the past half-century to dismantle tariff and non-tariff barriers to trade. But by far the main beneficiaries of trade liberalization have been the industrialized countries.

Developing countries' products continue to face significant impediments in rich countries' markets. (UN, 2001, p. 27).

Concretely, UNESCO presents some cases where countries from the developing world were seeking for developing alternative approaches for improving their education

systems, in terms of promoting better quality education. As stated by UNESCO, it was “often as challenges to the legacies of colonialism” (UNESCO, 2004, p. 6), or as proposals for developing “education systems with culturally relevant emphases on self-reliance, equity and rural employment” (p. 6). Those responses to the inequalities and unbalanced relationships between and within countries consider the importance and connection to the local cultures and identities, and try to analyze critically the world to build their systems from their specific historic and socio-cultural contexts. This is what Spring (2009) points to the relationship of the developed and the developing: although South American countries were influenced by colonialism, Paulo Freire emerged as an example for proving that that relationship can be bidirectional (Spring, 2009). Also, teachers can adopt the external ideas coming from the global arena through their own ‘cultural perspectives’ (Spring, 2009, p.7).

The contextual factor is assumed by UNESCO: “The huge diversity of contexts makes performance and achievements difficult to measure and compare” (UNESCO, 2000, p. 13), organization that recognizes the difficulties for comparing the countries in terms of the quality of their systems. Indeed, according to UNESCO, although it is easier to compare the students’ learning outcomes of the countries through international assessments –or the “cognitive development of the learners”; it is much more difficult to assess the values and attitudes that the different countries decide to educate in their students under its definition of EQL (UNESCO, 2004, p. 2).

3.4.5 Problems within the Developed Countries

Certainly, the countries of the developed world face their own problems. And beyond the silences about the educational problems and difficulties existing in these countries,

UNESCO has mentioned some of them in its documents. Firstly, within developed countries there are specific groups at-risk, such as “...indigenous and minority ethnic/language populations, those living in slums and in very sparsely populated areas, migrants, nomadic populations, individuals with diverse learning needs, children with disabilities and the poor in general.” (UNESCO, UNICEF, State of Qatar and Save the Children, 2010, p. 7).

Complementarily, UNESCO remarks that from the results of international assessments, it is also possible to identify those groups who are performing lower than the minimum required. This lower performance is related to “factors such as poverty, low socio-economic status, ill health and disabilities” (UNESCO, 2005, p. 25). Moreover, considering the information about literacy rates, UNESCO warns that the problem is affecting every country in the world, and it is not only a problem of the poor countries. Consequently, UNESCO mentions, for instance, that

In the Netherlands, some 1.5 million adults are classified as functionally illiterate, roughly 1 million of them native Dutch speakers. One-quarter of the native Dutch speakers are almost completely illiterate. In metropolitan France, 9% of adults of working age (18 to 65) – more than 3 million people – had attended school in France but had literacy problems, according to a 2004–2005 assessment (UNESCO, 2008, p. 18).

But as mentioned before, in spite of these problems briefly approached in EFA and MDG’s agenda, the focus remains on the challenges that the developing countries face – and particularly those “least able” (UNESCO, 2000, 2004). At this point, it is possible to propose that this may be a way of presenting that the “other,” developing world has a

relation to the notion that if international cooperation and the necessity for helping and assisting them, or this form of treating the “other” can be also interpreted as a form of reproduction of the relationship of dominance and dependence among them. In fact, there is an important emphasis in the kind of support and aid that the developed world can provide to those that are vulnerable. On the other side, would it be possible to think that those in vulnerability can support the developed and richest countries in someway?

3.4.6 International Cooperation and Solidarity: Development Assistance for Liberating or Reproducing Relationships of Dependency?

The relationship that UNESCO proposes between countries is within the framework of international cooperation. This is the way it was presented in 1990 and reaffirmed in 2000 in the context of EFA and the UN Millennium Declaration and the definition of MDG (UNESCO, 1990; UN, 2000).

The main interrogation of this framework is given from the existence of a contradiction between what UNESCO has declared in EFA and MDG discourses and how the international community has acted in fact, in terms of the support among countries. So, it is remarkable that UNESCO promotes in different documents the common challenge that humanity must tackle. There are explicit references to calls of action under “international solidarity and equitable and fair economic relations in order to redress existing disparities” (UNESCO, 1990, p. 12), or “To achieve progress, the developing countries will need the political and financial commitment of their richer country partners.” (UN, 2001, p. 3).

Moreover, economic measures are required to help the situation of the poorest countries and those with debt burdens, and in this case, the call is from UNESCO (1990)

seeking “equitable formulae to resolve this burdens” (p. 13). As treated before, the UNESCO’s focus and priority is on supporting the developing of the basic education systems of the vulnerable, the “least developed and low-income countries” (p. 32). According to UNESCO, the arguments for this prioritization range from moral to economic (“to rebuild their own economies”) in order to provide support in two forms: as technical cooperation and financial assistance (p. 30). Specifically, that “support could include training and institutional development in data collection, analysis and research, technological innovation, and educational methodologies” (p. 31).

Certainly, although this kind of support is needed from a policy development’s perspective, it assumes as well the transference and installation of a several *technical packages, policies* and other *requirements* in order to make those transformations. It is in this sense that EFA is well situated under the broader umbrella of MDG that promotes global changes and improvements in different social spheres. Nevertheless, those texts of international solidarity can also be interpreted as good intentions and polite discourses, and the power relationships among countries are not even mentioned.

Actually, there have been numerous petitions from UNESCO to the international community since 2000 -particularly the richest or developed countries and international development agencies- to fulfill the commitments of technical and financial assistance assumed in EFA and MDG for improving education: “Wealthier nations must adhere to their promises regarding official development assistance” (UN, 2001, p. 3). As a concrete fact, UN states in 2000 that the financial support compromised as Official Development Assistance was too low in relation to the promises made, affecting specially Africa and Asia:

Compared to the goal of 0.15 to 0.20 per cent of GNP as ODA to least developed countries, as adopted at the Second United Nations Conference on the Least Developed Countries in 1990, actual ODA flows were 0.06 per cent in 2000.

While the cutback in ODA has affected a large number of developing countries, it has hit Africa and Asia especially hard. (UN, 2001, p. 29).

The UNESCO's preoccupation is also stated in more recent documents (UNESCO, 2004, 2005, 2008), where some developed countries are explicitly mentioned, to remark the positive cases prioritizing education in their "aid packages" (as France, Germany, Canada and Spain) versus those giving it relatively low priority (such as the United States) (UNESCO, 2004, p. 31). In general, the diagnostic is not optimistic in terms of the aid received for basic education: UNESCO (2005) considers it "still inadequate" (p. 1).

And UNESCO detects and to some extent denounces another main problem in relation to financial aid: "Disproportionate volumes of bilateral aid go to middle-income countries with relatively good social indicators..." (UNESCO, 2005, p. 34). How can this situation be interpreted? Why would nations have decided to support middle-income countries instead of those "least able" or "poorest countries"? Why does almost double the bilateral aid go to the postsecondary level instead of supporting basic education? (p. 32). Then, to what extent have the commitments been fulfilled by the developed world?

Responding to this problem, UNESCO calls in EFA GMR 2009 to the developed countries and donors to support education development in low-income countries and specifically to "urgently review their current aid allocation" (UNESCO, 2008, p. 40). There is a main acknowledgment in relation to the promise of aid: "donors are not delivering on their commitments... These promises have been repeated several times

since. But the most recent data tell of a slowdown in aid for education and even more so in aid for basic education” (p.33).

Is there an actual will to transform the situation of marginality of a vast part of the world population? The UNESCO’s statements and facts about the unfulfilled promises in terms of financial aid, or the allocation of that aid in middle income instead of low-income countries do not present an optimistic projection in the mid term considering the way in which EFA financial commitments have evolved. Nevertheless, as it has been presented above, at the same time EFA and MDG discourses also presents possibilities in terms of how the policy-making process can consider different strategies for every country according to their characteristics and in terms of providing broader notions about the meaning, aim and goals of the educational sector for going beyond instrumental objectives.

The following final section presents a brief discussion of the topics elaborated above, proposing a reading through the lenses of CDA that considers the textual, discursive and social levels of analysis.

3.5 Integrated Analysis of UNESCO discourses

The analysis EFA and MDG agenda on education is complex for the extension, interrelation of the texts, but also because the EFA and MDG agendas approach education in a comprehensive way from different theoretical and empirical perspectives. In this sense, although the revision of documents was extensive in order to approach the core of the discourses, there are still many other documents directly related to those selected that go deep in the explanation, strategies and methodologies proposed by UNESCO. It is possible to categorize those discourses analyzed using the basic

categories proposed by CDA, as a possibility for elaborating their interpretation. While doing this, I attempt to respond to the two general research questions (and the related sub-questions) stated at the beginning: What kind of educational system's improvement is promoted by the goals, objectives, indicators and assumptions explicitly defined by the UNESCO's agenda? What are the main opportunities, difficulties and challenges that countries must face in this regard in terms of the definition and implementation of national and local policies?

The question about the kind of educational improvement has been largely discussed through the chapter. At the *textual level*, it has been referred to the understanding that UNESCO has and promotes about education, educational quality and literacy in the context of globalization. At this level, discourses and definitions of UNESCO are highly based in the use of facts and scientific evidence.

In this sense, the EFA and MDG challenges are presented as concrete "problems" that people and countries have: access to education, illiterate population, "poor" quality educational systems and the existence of many kind of discrimination affecting people in disadvantaged situations, among the most relevant. For solving these problems, UNESCO proposes the development and implementation of strategies that the countries should follow in order to improve. At the same time, UNESCO provides alternatives for an understanding of the crucial aspects involved: a) it recognizes that education is situated in the global knowledge economy, but also it states the broader understanding of education according to the UNESCO's principles and values; identifies different approaches of EQL and literacy, emphasizing a holistic understanding of those notions. For instance, in presenting the behaviorist, humanist and critical pedagogy's approaches,

UNESCO recognizes that those represent diverse alternatives for improving the educational systems.

Nevertheless, at a *discursive level*, it is possible to interrogate the UNESCO discourses in terms of going beyond the facts and problems presented in the EFA and MDG documents and towards the analysis of the emphasis in particular themes, or policies approached explicitly and adopted and promoted by the organization. Indeed, although at a textual level of analysis it is possible to know the “possibilities” (in the texts) for developing certain issues, at the discursive level UNESCO takes a position from the beginning of EFA in 1990. Through concrete actions, such as the relationship established through the networking with other IOs (WB and OECD) UNESCO defines that in spite of having a broader understanding of EQL and literacy, those are finally measured as learning achievements, whether in terms of what the countries follow as basic literacy or what PISA does to measure literacy, numeracy and scientific literacy.

In this sense, although some critical skills are presented as important dimensions of EQL -such as critical awareness and reflection, or the development of multiple literacies and citizenship- in the end, those are not considered to be measured, under the assumption that they are too difficult for assessment. In other words, while opening possibilities for education, UNESCO promotes actions according to “what can be done”, a ‘realistic’ approach, reinforcing in this way the understanding of education, EQL or literacy in a functional form, in its basic and restricted forms.

Here, there is an apparent paradox: education is understood both in its restricted form, but also UNESCO treats education as a panacea for the problems of the world (strongly from MDG perspective). However, it seems more to be a distinction of what is promoted

in the empirical versus the ideal world. While the functional perspective is presented as possible and practical, the “transformational” possibilities that education offers from liberationist approaches stay thus within the world of the ideas, and something similar may occur with the promotion and emphases in overcoming the inequalities. Because, to what extent is it possible to overcome the educational gaps between and within the countries, if in the end, the concrete measurements of EQL and literacy (basically assessments) are focused on the functional perspective of education? At the discursive level of analysis, the process of policy making can be interpreted as a continuum elaboration of policy recommendations from the beginning of the EFA agenda, and reinforced with the establishment of MDG. Because there is a discursive interrelation between MDG and EFA, and also with the discourses of other IOs mentioned by UNESCO, it is possible to suggest that “policy coherence” explicitly seeks to align countries in the common understandings of the improvement of educational management or the adequate policy development required. In this way the promotion of certain reforms has practically become a norm that shapes and influences the national education systems: decentralization processes, participation, accountability, governance, and financial spending appear as the most important discourses that have to be implemented by the countries in order to improve their educational systems.

In the third place, the level of the *social practices* is where a broader interpretation of EFA and MDG discourses can be placed. At this level, it is possible to interrogate the relationships of power. Particularly interesting are the discourses that UNESCO adopts in relation to development and how it appears, to some extent, to be the continuation of the basic and restricted form (functional) assumed in relation to EQL and literacy.

On the one hand, those discourses of development have been established through the labeling of the “other” poor, vulnerable, marginalized. And this silences the question about the development of humanity as a whole. As it has been presented above, it can act as a reproduction of the stigmatization from where it seems almost impossible to escape. To some extent, UNESCO as an International Organization together with others such as the World Bank presents themselves as part of those “developed”, as those organizations that know the final destiny of the educational improvement of the poorest and have to “help” them to achieve this common goal. This relates to the notion of *globalization from above* (Apple, Kenway and Singh, 2005) and the idea that it was the *Western colonizer* who imposed education systems in many countries (Hayhoe and Mundy, 2008).

Also, it is necessary to have in mind how explicitly these discourses about economic integration and development are present on the agenda. Is the aim of the educational improvement of the poor to reach a better immersion on the global economy? While this can be a result, I sustain that it has to be much more than that.

And many efforts for implementing actions in this sense are required. Fortunately, UNESCO and other IOs have assumed the relevance of considering the local context for the national definitions, and this opens actual possibilities for profound transformations based on the cultural identities of the local and national communities. On the other hand, within the understanding of a restricted notion of development, it seems that development is understood as a path from poverty to wealth, from being “underdeveloped or developing” to become “developed”. This represents the old model of development stated by Nussbaum (2010) where education is seen as a means for economic growth. This

model reproduces the idea that every “developing” country is following a “developed” model of the richest countries.

In the end, it appears that the question is about what has not been said, or at least what has silenced or avoided. Although there are some references to the educational problems that developed countries face, the emphasis or priority put on the poor makes it almost impossible to think in integrated alternatives for mutual collaboration of support among countries. In this way, the idea that the powerful, developed and richest countries have the control to help or support the disempowered and voiceless others, is reproduced. But as it has been shown that even this support can be problematic, as the actual lack of funding and political will, or the fact that some relevant part of the funding is allocated in the middle income countries and not in the poorest. In this sense the interrogation about the main interests and motivations that move the promotion of the educational improvement can be presented again. Following Robinson-Pant (2001), it seems necessary to recognize political agendas of the different development agents. Because,

Who is receiving the benefits and who is paying for the costs of the educational agenda?

CHAPTER 4: CONCLUSION

4.1 Reflecting upon UNESCO's Agenda and Current Educational Challenges

I start writing these concluding ideas while large numbers of students in Chile and elsewhere in the world are mobilizing for defending the right to a public education and demanding equal opportunities for all, regardless of socioeconomic and cultural differences. To a more or a less extent, educational systems are facing the same global trends related to privatization and cutbacks on public funding. At the same time, discourses for improving the quality of education have been adopted in the national public agendas.

The analysis of the EFA and MDG reported in this thesis shows how UNESCO has contributed to the promotion and reproduction of discourses on global knowledge economy and the importance of education for the economic development of the countries. Yet, it is necessary to admit that discourses are not limited to reinforcing the relationship between education and economy. In this sense, UNESCO makes explicit references to alternative models of education that overcome the reductionism of education as a subsector of the economy. This is possible because of the nature of UNESCO, as an institution concerned with issues of human rights and social justice.

Despite promoting broader conceptions of education, UNESCO, together with other IOs such as the World Bank and the OECD, has consolidated a strong network within which education is reduced to its contribution to the economic growth of the nation-states or to individuals' incomes. Such a view on education emphasizes the development of

human capital for improving the productivity and competitiveness of world countries in the international markets.

The human face of the agendas advanced by IOs is presented as the eradication of poverty, which has a major illustration in the agenda of the MDG. In the case of EFA, the emphases have transited from ensuring access to consider also the improvement of the quality of education with the objective that countries might overcome conditions of poverty and other social problems. Moreover, in a globalizing context dominated by economic interests/objectives, the notion of EQL has been reduced to basic skills in literacy, numeracy and scientific literacy. In this sense, although UNESCO presents extended visions of EQL once again, in the end, what UNESCO and countries around the world report as quality is reduced to quantitative terms. A case in point is the EFA Development Index, which advances the attendance and completion of 5 years of schooling as a proxy of quality.

However, UNESCO still recognizes many of the educational problems of world countries –specifically from the developing world-, and explicitly appeals the international community to participate actively in their solution. One of the most crucial problems is the existence of vast inequalities and educational gaps between but also within the countries. This appears as main challenge that the international community will face in the next years.

How to ensure EQL for all? This has been a main issue explored in this thesis. In part, the answer can be approached from the policy making process in education. But there are still difficulties: acknowledging that in the process of setting the agenda and defining educational policies, some values and beliefs are imposed over others. At this point, then,

some questions arise: Who will participate in defining what is and counts as educational system? Is there a possibility to achieve social consensus regarding main definitions in education, as promoted by the UNESCO in EFA? As mentioned before, in the current global scenario, it seems that the trends represent the vested interests of some sectors that put the economy at the centre of social development. But there are also opportunities for social change.

Indeed, although the top down approach to define the educational systems seems to be reinforced by International Organizations, more and more, UNESCO explicitly encourages the participation of the actors involved in educational processes at different scales, emphasizing particularly actors at the local level. However, at this point, a contradiction emerges. Whereas there is a promotion of higher involvement of local actors, the agenda seems to be clearly established by the top levels. This suggests that there would not be too much room for local communities to reject the global agenda. It is not clear how a school community or even a district can define a different goal from those defined at the upper levels. On the contrary, it appears that everyone has to follow this path and conform to blueprints defined externally.

Thus, I would argue, considering the participation of local actors is an imperative for future policy development. Specifically, I refer to the direct involvement of the community: teachers, principals, families, researchers and local authorities, but equally essential, the students. They have not been considered strongly enough as active players in discussions on and debates over education. This situation seems contradictory considering the explicit promotion of students as active learners (and not passive actors in the educational process). Students demand to be heard, and in my opinion, this has to be

granted within the governance arrangements that societies make. Otherwise, they will remain *the other* beneficiaries, subjects of policies they have not decided.

Definitely, the educational agenda and the definition of the meaning and aims of education for a country or a community are and will be controversial issues. With respect to this, I contend that certain minimums are required for improving education, and that these justify the existence of the global agendas. Nevertheless, this does not mean that these global discourses have to be imposed to the local or even national actors, but negotiated and discussed. I take up the postulates of Paulo Freire –also referred by the UNESCO in EFA- for whom students, both children and adults, must acquire minimum literacy skills that foster in them a meaningful consciousness of their position in the world so that they can achieve individual and social emancipation. Otherwise, how to envision and dream in another kind of society? What steps and/or mechanisms are proposed towards its achievement? In other words, social change calls for a previous understanding of our current ways of life –our privileges and oppressions- and thus to the acknowledgement of the multiple possibilities for the future. From this insight is possible to work towards new forms of education and social development.

4.2 Main Highlights of the EFA and MDG Agenda

There are specific points that I would like to emphasize as main highlights of the EFA's and MDG's agendas. I use these points for proposing/suggesting recommendations to actors involved in educational processes and specifically those working and participating in policy development both at the local and global levels: policymakers, researchers, academics, teachers and students.

4.2.1 The Global Agenda and IOs Networking

As mentioned before, UNESCO is producing and reproducing the agenda of the global knowledge economy. Networking with other IOs, the UNESCO understands and labels the current global context in a way that emphasizes the relationship between education and economic benefits, namely in terms of productivity, employment and income, access to markets, and economic growth. This stance on education is reinforced in the MDG, where education is understood as strategic for reducing poverty.

Certainly, the economic sphere is a significant dimension of social life. In this sense, it is crucial that actors within the territory understand the positive benefits of a more educated citizenship. However, I advocate for promoting a wider meaning of education as means for reaching social justice, peace and freedom among human beings. It seems necessary to reinforce the cultural, ethical and social dimensions directly affected by education. To transform current social structures that reproduce injustices and privileges of peoples, there is still a long way to go for liberating education from the instrumental economic rationality. I believe that this challenge must be assumed firstly as a discursive struggle within the educational networks of policymakers, academic and researchers.

4.2.2 Incipient Markets in Education

Although UNESCO admits and fosters the relationship between education and economy, there is not, within its discourses, an explicit promotion for developing educational markets or increasing the participation of the for-profit sector as providers of educational services. However, as some scholars have noted, this trend is still incipient and might have important implications for educational systems around the world in the short and mid term.

Because of current trends in education, a major development of educational markets is expected. In order to face this situation, it is necessary that citizens at all levels become highly involved in the educational definitions. It is here where discourses on citizen participation and involvement can make more sense: to defend what is considered as a public good geared to the welfare of all the citizens, not just as a sector oriented to the economic benefits of a few. Special attention must be put to the regulation of the quality of educational goods and services offered by the for-profit sector. Apart from the role of educational authorities in this regard, the regulation may take forms of social control by the community. For this, it is necessary to develop specific mechanisms for making the private sector accountable to civil society.

Assuming the participation of the for-profit sector in education -something promoted by the WTO in the last years- such a regulation is needed. Nevertheless, I think this trend is not necessarily inevitable –as any other social trends-, but its detention or reversion will strongly depend on the will and participation of those who defend public education.

4.2.3 Strengthening of UNESCO

As already mentioned, the EFA agenda discusses educational development a broader conception and UNESCO approaches education in its different dimensions. Therefore, the strategies established by the UNESCO in order to strength its position in the coordination of the educational challenges seem pertinent. In this sense, and considering the aims of UN as an organization promoting much more than economic goals, it is critical that the UNESCO becomes more empowered in relation to other organizations, such as the WB or the OECD.

The UNESCO's empowerment cannot occur only at the discursive level but also at the level of resources for supporting educational development. For this, countries, including state representatives, NGOs and civil society, must recognize the distinctive nature of UNESCO from that of other IOs. To do so, it is necessary to validate and promote UNESCO as the leader of educational development internationally, over the power of the World Bank and OECD, with restricted interests in promoting educational improvement.

4.2.4 Education as a Panacea

There is a marked orientation within the MDG to consider education as a key factor for overcoming social problems related to poverty, health, and environment sustainability, among the most significant ones. Indeed, through the recurrent use of statistical evidence, the idea of more years of education is always equated with more benefits for people (e.g., better income and health). In turn, EFA discourses recognize that those dimensions are directly affecting the kind of education that people are receiving. Thus, UNESCO acknowledges the large influence of the following dimensions in the educational opportunities of the peoples: socioeconomic status, gender, race, ethnicity, nationally. In light of this, the idea of education as a panacea for the world problems represents a confusing message to the international community. Education cannot solve the social and economic difficulties of the world while huge inequalities among peoples and countries are reproduced permanently.

Nevertheless, education is a key sphere for fostering a particular kind of society. As UNESCO has pointed out, one of the main current challenges for the educational agenda is to face and address the large disparities between and within the countries. This has to

be assumed unanimously by different sectors and actors if actual improvements are expected.

4.2.5 Educational Quality and Literacy as Relative Notions

UNESCO furthers the coexistence of the absolute and relative dimensions of EQL and literacy. Indeed, as it has been shown in this work, EQL and literacy agendas represent complex agendas for educational development. On the one hand, EQL can be related to several dimensions that consider certain minimums in infrastructure, equipment, quality of the teaching formation, educational management and processes, and importantly, in terms of the students' learning outcomes. Similarly, literacy –in its broader sense- is understood from the attainment of basic skills –such as reading and writing- to the acquisition of multiple literacies. The recognition of the relative dimension of EQL and literacy is crucial, considering the different realities and backgrounds of students. Whereas acknowledging so, UNESCO promotes the participation of countries in standardized international assessments, with the consequent problem of comparing realities that are not comparable. Moreover, it seems that the promotion of these assessments might reproduce the logic of competition among countries, schools and students, preoccupied for being in the top of the rankings. This logic acts against the solidarity and cooperation needed to overcome those gaps and inequalities identified by the UNESCO as main challenges in the educational sphere.

What seems as necessary in every level is a commitment to move towards the elaboration of instruments that allow for overcoming the simplistic literate/illiterate dichotomy emphasized by the UNESCO. Indeed, with the existence of multiple literacies, how are countries evaluating the numerous skills that students need to make their way in

current society? At this point, it is imperative not only to consider the need for global skills but also to promote the identification of local particularities that allow students to (re)create their realities.

At the international level, it seems urgent to unify criteria among IOs in this issue. For example, while Chile declares to the UNESCO to have an almost 100% of literates in the country, the information coming from PISA (OECD) shows otherwise. Chile's literacy rate appears considerably lower than the average one in the OECD countries. In this sense, UNESCO might develop more objective –contextualized and/or adjusted- assessments of EQL and literacy, in order to avoid the existence of contradictory information from different sources. Moreover, it emerges as pertinent to advance in the evaluation of the goals related to the student's empowerment, social awareness and critical reflection, proposed in the UNESCO agenda.

4.2.6 Policy-making, Educational Reform as a Continuum and the Crucial Role of Human Resources Implementing the Improvement

UNESCO makes explicit its role by informing countries in the process of educational policy making. Specifically, it emphasizes an active role of governments in the definition of the aims of the system and in the implementation of the educational reforms in different areas. And governments, thus, have to adopt specific agendas and policies regarding main issues, as the definition of EQL. For this, UNESCO asks that governments elaborate an educational plan at the national and sub-national scales with the aim of improving national education. On the other hand, educational policy making deals currently with governance reforms to modernize the educational system as a whole:

these reforms are related to the introduction and the strengthen of mechanisms of participation, accountability and transparency.

Moreover, it is fundamental to note that despite the relevance of increasing educational spending and funding –a central issue in the EFA and MDG agenda-, resources *per se* do not guarantee or ensure educational improvement. Indeed, financial resources represent a critical dimension, but are teachers, principals, administrators, academic, researchers and policymakers the ones who will make sense of any attempt for improving and make informed decisions in order to enhance the national education.

Thus, in these three dimensions -national and local definitions of education, reforms in education governance, and educational expenditures- there is a transversal element that UNESCO recognizes as crucial: the focus on the capacity building of the educational systems. In my opinion, this dimension is really important for the achievement of any expected improvement, and it must have principal attention of the policy-making process.

Reforming or transforming the educational system requires installing capacities within the whole system: in terms of human resources, from educational authorities and staff to researchers and scholars working in the field. At different territorial levels, they need to be aware of not only current discussions and agendas in education but also the methodologies and mechanisms to promote participation and involvement of other actors. Likewise, it is relevant to count with reliable information and data systems that support the decision making process. For this purpose, it is necessary to have governments commit to invest on the development of these capacities related to the persons but also to facilities of the educational system. In short, enhancing the capacity building might

produce a more efficient use of the resources at different stages of policy-making, from designing to evaluating educational policies.

In the end, with so many challenges in education, reforms are confirmed as a continuum for improving the educational systems.

4.2.7 Global and local encounter

Decentralization or more participation from the bottom –local level- is understood as the possibility for improving education and, at the same time, as the reinforcement and promotion of democratic values and citizen responsibilities. On the one hand, UNESCO recognizes that educating in global values is required, with the recognition and participation of local particularities. On the other, the local cultures and identities need to be considered in order to have a pertinent education that responds to the needs and demands expressed by communities. From a functional perspective, the major involvement of local actors will make it possible to improve the effectiveness of the system and to impact positively on students' learning outcomes. From a critical perspective, their participation will produce opportunities for the transformation of the educational systems and its final aims towards more social justice and equality within the societies.

In my opinion, it is also important to recognize that, in the connection between local and global levels, there are global discourses and educational challenges that are well received by local communities and actors. This situation represents a possibility for overcoming a relationship between the global and local that is conflictual *per se*, considering the existence of competing discourses within the international and national

levels about education. In other words, the global-local relationship might be conflictual, but it can also be one of cooperation between actors and institutions around the world.

At all levels, governments must provide opportunities and mechanisms for producing dialogue and participation in the decision-making process. This implies providing diverse actors actual opportunities for deciding the allocation of resources, according to the necessities of the local communities. In my opinion, this needs to be balanced with the visions and definitions reached at other levels, which, concretely, will further dialogue and discussions about international, national and local motivations and interests. Also, acknowledging the power relations among and within the countries will pave the way for openly discussing positions of resistance and rejection of educational projects imposed from the top. Moreover, assuming the “culture of dialogue” proposed by UNESCO might be an opportunity for reaching consensus on global values that need to be included in educational process. Certainly, global values must represent a holistic vision of education, including its ethical, normative and philosophical dimensions. In this sense, the restricted understanding of the global values in an economic sense needs to be balanced with other values that education must promote, such as peace, respect, solidarity and social justice among peoples and nations.

4.2.8 The Other as the Poor or Vulnerable

EFA and MDG agendas reproduce notions of development associated to the developed-developing dyad. Indeed, the focus of the agendas is put on “the other” living in problematic situations. To some extent, pointing out other societies, countries and peoples, UNESCO positions itself within the developed world, where the richest countries belong. In doing so, UNESCO seems to reproduce a paternalistic approach vis-

à-vis developing countries with respect to the way in which the latter ought to do to overcome *their* precarious situations and promote the dream of becoming part of the developed world.

But, aren't we all developing human beings and societies? Has the developed world reached a final state, absent of problems and conflicts? Certainly, this is not the case, and many problems are identified everywhere. Reproducing certain discourses about the world order, MDG and EFA agendas do not dip in those problems. It might be hypothesized, I would suggest, that acknowledging the problems in the developed world could lead to the transformation of the dominant model –or the beginning of the end of the privileges of nation-states in a dominant position. Furthermore, even thinking that this focus on the vulnerable other would be adequate, why is the international cooperation or political will not responding to the international commitments to help the other as it was established?

In the acknowledging the relative dimension of educational quality, it seems necessary to open a discussion that considers the problems faced by different societies regarding educational matters. Not only this would promote an actual interchange of experiences between countries but it would also diminish some countries sense of superiority over others. The situation of Africa is critical in this sense: it is needed to end with the stigmatization that is reproduced from the international community. Although different countries need actual support, they do not need recipes to achieve development but support to improve the conditions for accomplishing their own social aims. Development cannot be considered as a final state but collective ways of improving human beings' quality of life in freedom.

As a main challenge, it appears necessary to overcome the reproduction of knowledges' hierarchies in order to value the ways of life, methods and truths coming from the traditionally marginalized voices.

4.3 Closing Remarks

As I stated from the beginning of this research, the UNESCO agenda cannot and must not be exempt from questioning. The critiques made in this research are expected to provoke and stimulate discussions on the kind of education we need to develop in the current times. In this sense, these critiques have to be read as prompts for fostering and implementing actual changes in education. Defeating determinist perspectives that approach education as an apparatus that reproduces the social order, this study wants to be an invitation for everyone's agency at different levels. Education is clearly stuck in old instrumental rationalities and restricted development ideas of the past century. It is time to bring it back to the public sphere as a common good, facing the main task of reducing large educational inequalities and gaps.

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APPENDIX: Education for All (EFA) and Millennium Development Goals (MDG)

Education for All goals (UNESCO, 2005, p.3):

1. Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children.
2. Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete, free and compulsory primary education of good quality.
3. Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes.
4. Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults.
5. Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality.
6. Improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

Millennium Development Goals related to education (UNESCO, 2005, p.3):

Goal 2. Achieve universal primary education.

Target 3. Ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling.

Goal 3. Promote gender equality and empower women.

Target 4. Eliminate gender disparity in primary and secondary education, preferably by 2005, and at all levels of education no later than 2015.